

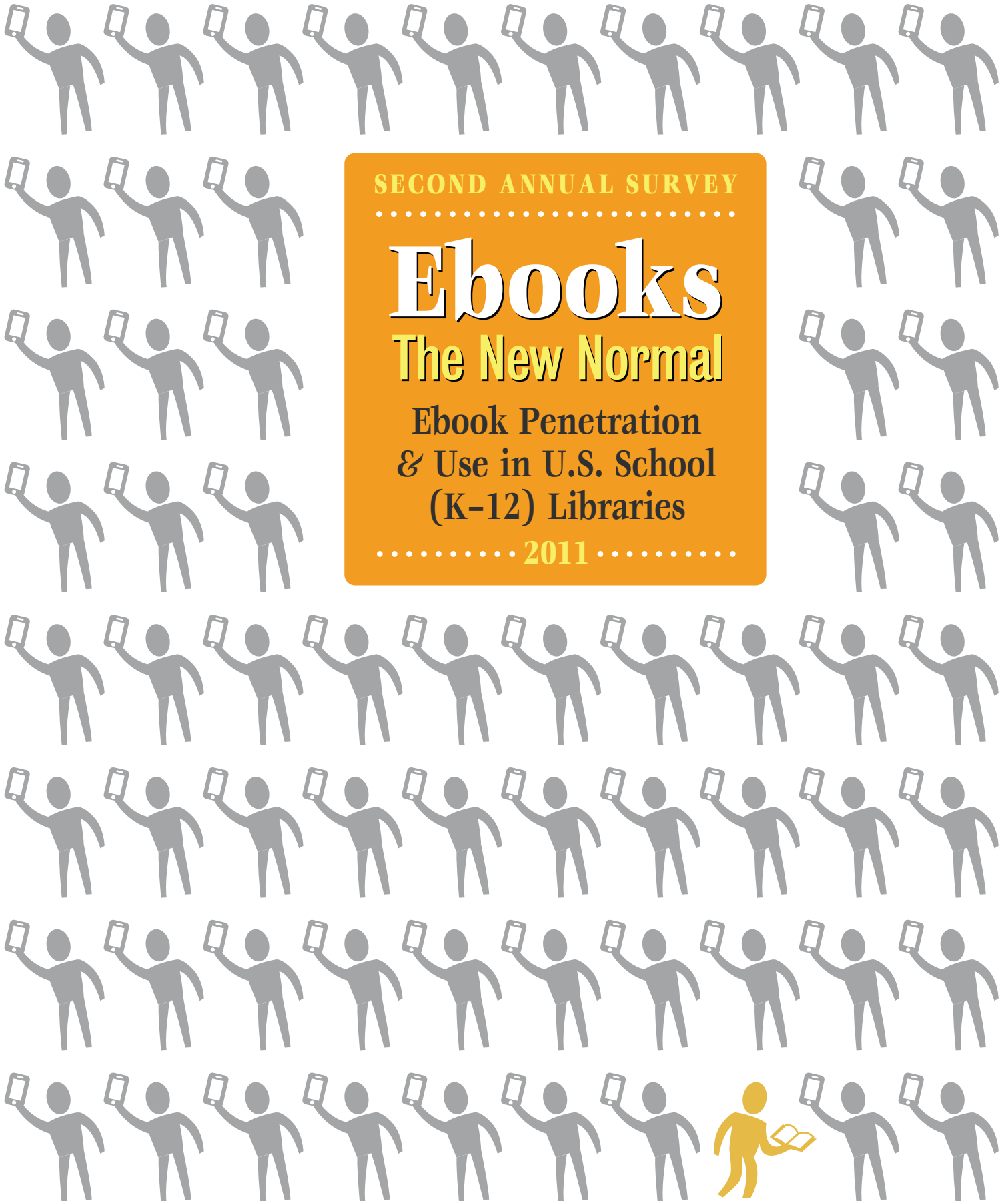
SECOND ANNUAL SURVEY

Ebooks

The New Normal

Ebook Penetration
& Use in U.S. School
(K-12) Libraries

..... 2011



Survey of Ebook Penetration & Use in U.S. School Libraries

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EXECUTIVE SUMMARY

School libraries have specialized needs that differ from higher-level academic libraries and public libraries. For the lower grades, fostering an interest in reading is one crucial purpose of a school library, while in the higher grades, teaching students how to use research materials and complete academic assignments is an important role that the school library plays. In addition, school libraries function as learning centers for the whole school, providing teachers and administrators with the tools they need to do their job.

Last year, we found that school libraries were still in the earliest stages of adding ebook options for students. This year the 905 respondents to our survey have experienced expansion in that direction, even if the total percentage of school libraries carrying ebooks does not approach the more advanced stages of public and academic libraries.

Ebook Collections

Just under half (44%) of U.S. school libraries currently offer ebooks to users—up from 33% last year. The likelihood of carrying ebooks increases by grade level; 71% of high school libraries, 55% of middle schools and 35% of elementary schools currently offer them.

Of those libraries that do *not* currently offer ebooks (56% of all school libraries), 22% say they will definitely purchase ebooks to add to their collections in the next two years, while the majority—60%—*may* purchase them, but it's not a priority. Only 8% have ruled out ebook purchasing entirely. With so many states and localities under severe budget constraints, many schools simply don't have the funds to institute an ebook collection.

The number of ebooks carried by school library media centers has increased substantially in the past year, from a mean of 49 in 2010 to 397 in 2011. The size of ebook collections in school libraries rises proportionately with grade level, from elementary to high school.

Average # ebooks	Total	Elem- entary	Middle/ Jr. High	High School
2010	49	45	47	60
2011	397	85	119	365

Ebook circulation increased to an average of 313 in the 2010-2011 school year, up from 193 the previous year. Circulation increases were most notable in high school (+71%) and elementary school (+59%) libraries, playing catch up to middle schools whose circulation last year was already relatively high and only rose 14%.

Ebook circulation	Total	Elem- entary	Middle/ Jr. High	High School
2009-2010	193	190	235	106
2010-2011	313	303	267	181
% change	+62%	+59%	+14%	+71%

Looking ahead, 67% of all survey respondents expect ebook circulation to increase again next year, with an overall projected increase in circulation of 43%. Not all school libraries allow remote access to the catalog, therefore students are only exposed to the library's ebook holdings while inside the library, affecting circulation.

"We purchased a new circulation and book library management system last year that allows remote access. I expect our requests to increase by 100% because students will have access to our circulation from home."

A third of school media centers (33%) reported seeing fresh faces using the library as a result of offering ebooks. The number is highest for high school libraries (44%), which helps explain the large rise in circulation they experienced.

<i>Ebooks brought new users to library...</i>	<i>Total</i>	<i>Elementary</i>	<i>Middle/Jr. High</i>	<i>High School</i>
	33%	27%	34%	44%

When asked about the primary drivers of ebook purchases, the top answers were projected usage, multiple users allowed, and requests by faculty and students. A quarter (27%) of all respondents have witnessed an increase in demand for ebooks in the past year, even if that increase was not especially "dramatic" (only 6% said they saw a "dramatic" increase in demand). Increased demand for ebooks is highest among middle school users. Just over half of all schools (58%) said they receive no requests for ebooks.

Ebook Categories Offered

Children's nonfiction edged out children's fiction as the top category of ebooks that school library media centers offer users—children's nonfiction grew from 39% last year to 46% this year, while children's fiction dropped from 51% to 45%.

<i>Ebook categories offered by library media centers...</i>	<i>2010</i>	<i>2011</i>
Children's nonfiction	39%	46%
Children's fiction	51%	45%
Reference (non-circulating)	42%	36%
Classic literature	n/a	36%
Children's picture books	34%	30%
Young adult fiction	23%	26%
Young adult nonfiction	24%	20%
Graphic novels	n/a	14%
General adult nonfiction	10%	7%
Noncirculating reference ebooks ONLY	13%	7%
General adult fiction	8%	6%
Textbooks	n/a	4%
Bestsellers	3%	4%

Naturally, elementary school collections are more likely to include children's fiction and nonfiction, while high school collections emphasize reference titles,

then young adult fiction and nonfiction. For middle schools, young adult fiction is the top category offered. In the last year, elementary school libraries put extra emphasis on acquiring children's nonfiction, while middle schools and high schools both reinforced their young adult fiction ebook collections.

Marketing Ebooks to Students/Faculty

The top barriers to library user's ebook consumption are unawareness of ebook availability, limited access to ereading devices and lack of training on how to use them.

About a quarter (28%) of school library media centers do not (or do not yet) market their ebook collections specifically. Just over one-half (53%) spread the word about ebook availability during classroom instruction, while 47% rely on their general online catalog. Thirty-two percent have a link to their digital collection on the library's website. Many of the respondents to this year's survey indicated that they are in the earliest stages of offering ebooks and they know they could be doing a better job in this area.

"We are just at the beginning of this exciting new way of providing content to students and continue to seek materials/methods of delivery which best serve our students/faculty."

This is an opportunity for publishers to help, perhaps by developing advertising and promotional materials for select ebooks, much like they do for print titles. Some verbatim comments indicated that posters, and other marketing materials, would be welcome in marketing ebook collections to students.

Ebook Readers and Formats

The library computer is becoming less popular for reading ebooks, dropping from 72% of respondents last year to 56% this year. The user's own desktop or laptop computer or netbook remains relatively steady at 54%.

It is the dedicated ebook reader that is gaining in popularity, rising from 9% of respondents last year to 21% this year. Ereaders will become even more popular when more school libraries allow downloading of ebooks to personal ereading devices. Currently only 30% of school libraries allow this. The time is right—with Kindles selling for as little as \$79 this November, we suspect parents will think this is a good time to purchase them for their children.

Device(s) on which library users most often read ebooks...	2010	2011
Library/ classroom computer	72%	56%
Personal laptop/ Computer/ Netbook	52%	54%
Dedicated ebook reader	9%	21%
Other portable device	13%	14%
Don't know	9%	13%
Other	6%	4%

Likewise, ebook formats optimized for specific ereading devices—like the Kindle or Nook—have quickly become the most preferred formats for school library

ebook users. The plethora of incompatible formats remains a large bone of contention among libraries (and not just school libraries, but libraries of all kinds). And the inability to download ebooks to individual ereaders is a common complaint.

“Managing e-books is taking up a larger and larger portion of my time. Currently we have e-books from multiple publishers, including Gale, Marshall Cavendish, ABC CLIO, Salem, and Infobase. Plus, we now have Kindles with e-books that we have purchased from Amazon, and we have several e-book titles purchased from Follett. Each e-book provider has a separate user interface with different features, making the whole e-book "stew" quite complicated for both users and the library.”

Media specialists in general, and especially in less affluent areas, are concerned about providing ebooks for students who don't have internet access or the hardware to read them. In response, seventeen percent of schools currently circulate preloaded reading devices (up from 6% last year), and a further 40% are considering it. Naturally, cost is a big barrier but the risk of lost or damaged ebook readers is also a factor. For those that do lend ereaders, the average number of devices available is 11.

Some librarians are awaiting device standardization before entering this arena. Libraries that do circulate ereaders overwhelmingly prefer Barnes & Noble's Nook to Amazon's Kindle. Again, the new low priced Kindles entering the market this November may be a game changer.

The vendor typically determines the usage license and different vendors have different models. Thus, 57% of school libraries say they license the use of only a single ebook at a time, much like a printed book model (up from 40% last year), while 36% allow unlimited access or simultaneous use of an ebook title (relatively unchanged from 35% last year).

Ebook Budgets and Purchasing Terms

On average, respondents estimate they spent \$1,020 on ebooks in the 2010-2011 school year. This represented 2.9% of materials budgets, up from 1.7% the previous year. School library respondents feel that in five years, ebooks will represent 8.0% of their total materials budget.

Projected to the entire school universe (and accounting for schools that do not carry ebooks), an estimated \$50 million was spent on ebooks in U.S. schools in the 2010-2011 school year. As we see more schools enter the ebook arena, the dollars spent on ebooks will rise sharply.

For the most part, money to pay for ebooks comes from a portion of the media center's book budget. But a good number of our respondents (13%) rely on special grants or gifts for their ebooks.

There were a number of comments from school librarians lamenting that they are often required to purchase ebooks with a credit card rather than a purchase order, and this is a hindrance to their ability to make ebooks available.

“There are 2 distinct types of ebooks: REFERENCE that is available through the web; CIRCULATING (fiction, non-fiction that should be downloadable - we cannot purchase these for download to devices with a p.o. from Barnes & Noble, Amazon, Follett or anyone else... frustrating!!”

When libraries purchase ebooks, more often than not (63% of all respondents) they purchase with “perpetual access.” Twenty percent purchase a subscription, but this is becoming less popular (down from 31%). “Concurrent seat access” has grown substantially, from 2% last year to 16% this year.

When asked what respondents felt would be a “fair and realistic” ebook licensing model, the number one response was “maximum access,” chosen by 64% of school library respondents. “Unlimited circulation using one reader/one book model” was selected by 53%. Not surprisingly, a “lending cap model” like the recent HarperCollins cap at 26 circs was not especially popular (4%).

Libraries and Their Vendors

Follett is the top vendor patronized by school libraries for ebooks with Gale/Cengage a distant second. High school libraries are the most likely to buy ebooks directly from the publisher.

As for which vendor libraries prefer to work with, Follett tops the list with Barnes & Noble a distant second. Like most other libraries (public and academic) we surveyed, 38% said “no preference.”

The most vitally important attribute of ebooks for school libraries is “fair price”—this was either very important or important for almost every respondent to this survey. “Wide selection of titles and formats” and “customer service” tied at number two. “Ebook available from print vendor” has increased tremendously, as has “multiple device options.” “Inclusion of color images” is also an increasingly important attribute—especially if ebooks are to appeal to younger readers.

“I don’t see why ebooks for libraries are priced so much higher than personal ebooks one may buy through Amazon or B&N.”

Conclusions

School libraries are still in the earlier stages of ebook adoption, and thus are starting to experience some of the advanced concerns about digital rights management, competing and conflicting formats, and simultaneous use that other libraries have developed. They are far more vocal about these issues this year than had been last year.

Pricing, formats, DRM, and inability to download to preferred devices—these are persistent bugaboos for school libraries, and are the primary factors that are preventing ebooks from expanding as dramatically as they could be. At the same time, school budgets—especially public school budgets—are tight and will probably only get tighter.

If users—especially those at the early and impressionable ages of el-hi school library users—are thwarted or frustrated by the ereading experience, they will simply avoid it as they get older. One common comment was that kids just read

“the Internet” rather than specific books, be they digital or print. The ebook experience users have can either continue or halt that trend.

INTRODUCTION

About the Library Journal Ebook Survey

Our 2011 survey repeats the majority of questions from last year's survey, and in many places reveals some eye-opening trends. We asked some new questions, some follow-up questions to what we had asked on the first survey, and used the results of that first survey to tailor some of the options on the 2011 questionnaire.

The survey included two open-ended questions. The first solicited general comments from school libraries about ebooks in general, and provide some valuable insights and express important and relevant concerns. A selection of these responses are added at the ends of Chapters 2, 3, and 4.

Responses to the second open-ended question, "What do you need from publishers/vendors to make incorporating ebooks easier?" appear at the end of Chapter 5.

The survey methodology and questionnaire are included in the Appendix.

Structure of the Report

Each section of this report is laid out in basically the same way, each of which provides various levels of detail. The bulk of each chapter provides top-level survey results in chart form—in essence, the "all responses" results, or what all libraries surveyed said about a specific question. This gives an overall idea of the prevailing attitude.

Each chart includes both the 2011 data as well as the 2010 data (where the same question was asked in 2010) for comparison. We altered some of the response choices from the last survey, and we indicate on the charts where differences appear. Phrasing of responses and even the order of responses on a questionnaire can have profound effects on the results one gets, but we feel confident that the vast majority of the responses support a comparison with last year's survey. However, in those cases where data are not completely congruent, we've called attention to it. In some cases, adding both surveys' datasets would have made a chart unreadable, so we elected to use just the 2011 data and highlight any substantial changes in the accompanying commentary.

Each chart is followed by a corresponding table that breaks down the survey responses by type of school library (elementary, middle, or high school), whether it is public or private, and size of materials expenditures. (We include both 2011 and 2010 data for those who want to compare the entirety of both datasets.) Different sizes and types of libraries have varying attitudes and behaviors and it's a mistake to assume that all libraries think and act alike. An elementary school library will have a different set of needs and attitudes and be subject to different forces than a high school library.

For More Information

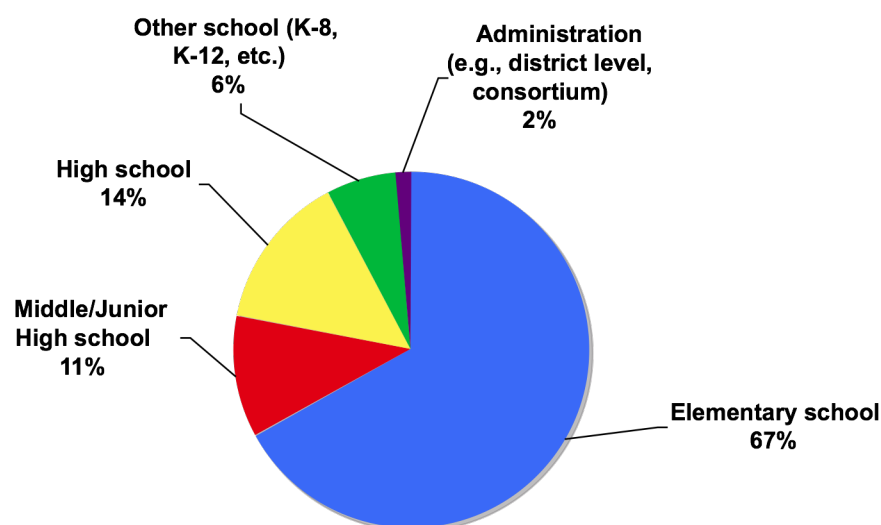
For questions or comments regarding this study, please contact our research manager Laura Girmscheid by phone (646) 380-0719 or by e-mail at lgirmscheid@mediasourceinc.com.

1. PROFILE OF RESPONDENTS

Type of Library

As the chart below shows, 67% of the school libraries responding to this questionnaire described themselves as an “elementary school” while 14% and 11% described themselves as a “high school” and a “middle/junior high school,” respectively. We also caught a small number of other types of schools (generally schools that teach a mix of lower to upper grades) as well as administrative offices.

Figure 1. Q1: Which of the following best describes your library? —All school libraries



The table below breaks the data down by materials expenditures.

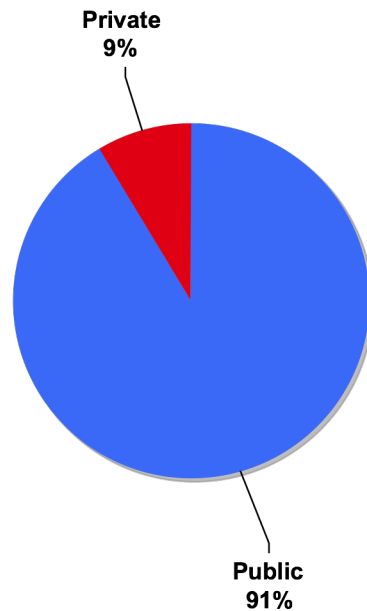
Table 1. Q1: Which of the following best describes your library? —School libraries by 2010–2011 materials expenditure

	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Elementary school	46%	40%	20%	4%
Middle/Junior High school	19%	27%	22%	7%
High school	15%	20%	43%	49%
Other school (K-8, K-12, etc.)	21%	12%	14%	19%
Administration (e.g., district level, consortium)	0%	1%	2%	20%

Public or Private

The majority (91%) of respondents to our survey were public schools, while 9% were private schools.

Figure 2. Q2: Is your institution public or private? —All school libraries



The following table breaks the public/private data down by type of institution and materials expenditure.

Table 2: Q2: Is your institution public or private? —School libraries by type of school and materials expenditure

	Type of School			2010–2011 Materials Expenditure			
	Elem.	Middle	High	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Public	94%	95%	87%	86%	90%	87%	77%
Private	6%	5%	13%	14%	10%	13%	21%
Other	0%	0%	0%	0%	0%	0%	3%

Number of Students

School libraries responding to our survey have an average of 714 students in their school (median 625).

Figure 3. Q5: Approximately how many students attend the school you work in?¹ —All school libraries

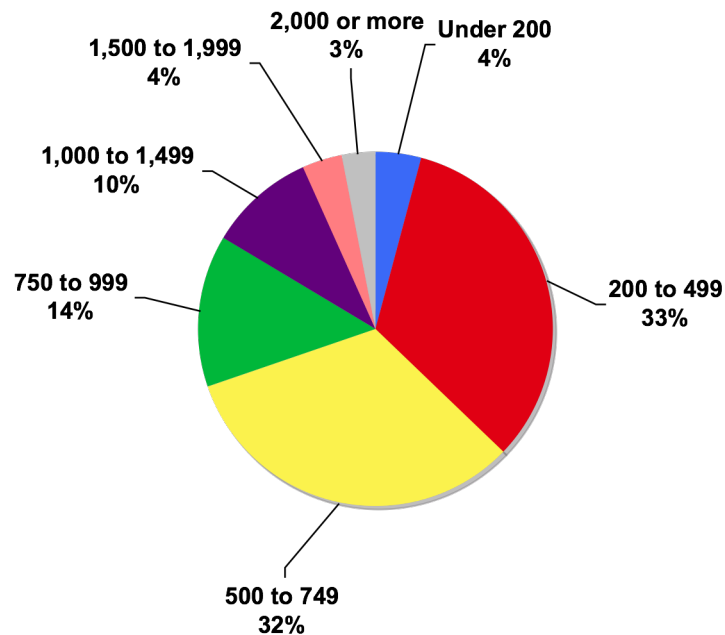


Table 3. Q5: Approximately how many students attend the school you work in? —School libraries by type of school and materials expenditure

	Type of School			2010–2011 Materials Expenditure			
	Elem.	Middle	High	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Under 200	4%	1%	2%	11%	1%	0%	1%
200 to 499	41%	14%	14%	40%	28%	16%	4%
500 to 749	36%	31%	16%	29%	34%	25%	15%
750 to 999	10%	32%	15%	9%	18%	23%	24%
1,000 to 1,499	7%	18%	16%	8%	12%	15%	16%
1,500 to 1,999	1%	2%	19%	1%	3%	11%	19%
2,000 or more	0%	1%	17%	1%	3%	9%	20%
Mean	578	822	1,254	569	762	1,036	1,417
Median	625	875	1,250	350	625	875	1,250

¹ If you work in more than one school or at the district level, please answer for the total number of students you serve.

Materials Expenditure

The mean media center materials expenditure for the 2010/2011 school year for school libraries responding to our survey was \$9,400 (median expenditure was \$7,500). Twelve percent of respondents reported that their total materials expenditure for the year was under \$2,500, while 5% reported that their total expenditure was over \$20,000.

Figure 4. Q6: What was your library media center's total materials expenditure this past year (2010–2011 school year)? —All school libraries

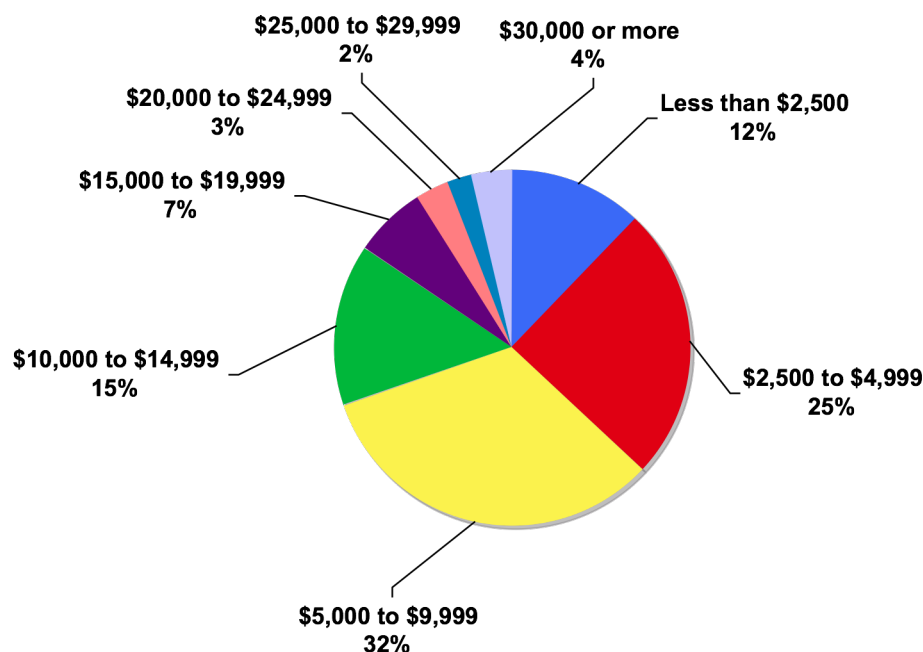


Table 4. Q6: What was your library media center's total materials expenditure this past year (2010–2011 school year)? —School libraries by type of school

	<i>Elem.</i>	<i>Middle</i>	<i>High</i>	<i>Public</i>	<i>Private</i>
Less than \$2,500	14%	7%	5%	32%	0%
\$2,500 to \$4,999	29%	20%	10%	68%	0%
\$5,000 to \$9,999	36%	37%	19%	0%	100%
\$10,000 to \$14,999	12%	22%	22%	0%	0%
\$15,000 to \$19,999	5%	7%	14%	0%	0%
\$20,000 to \$24,999	2%	3%	8%	0%	0%
\$25,000 to \$29,999	1%	2%	7%	0%	0%
\$30,000 or more	1%	2%	15%	0%	0%
Mean \$	7,400	9,600	16,800	3,000	7,500
Median \$	7,500	7,500	12,500	3,800	7,500

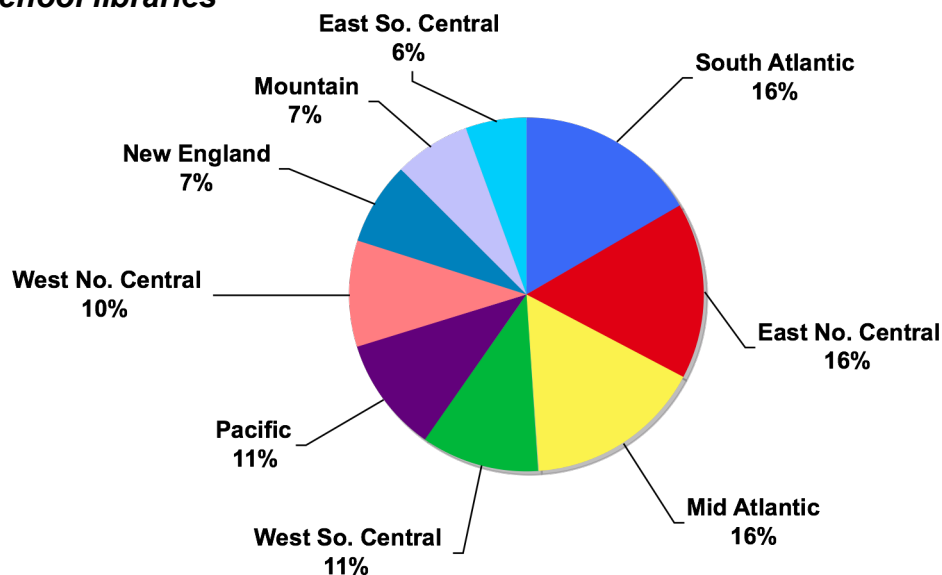
Library Location

The following figure shows the geographical location of the libraries responding to our survey, based on U.S. Census Bureau regional classifications:

- New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
- Mid-Atlantic: New Jersey, New York, Pennsylvania
- South Atlantic: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia, District of Columbia
- East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin
- West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota
- East South Central: Alabama, Kentucky, Mississippi, Tennessee
- West South Central: Arkansas, Louisiana, Oklahoma, Texas
- Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
- Pacific: Alaska, California, Hawaii, Oregon, Washington

These nine regions are also grouped into four larger U.S. regions:

- Northeast: New England and Mid-Atlantic
- Midwest: East North Central and West North Central
- South/Southwest: South Atlantic, East South Central and West South Central
- West: Mountain and Pacific

Figure 5. Q3: In which region of the country is your library located? —All school libraries

The largest percentage (33%) of respondents work in the South/Southwest regions of the U.S.

SOUTH/SW	33%
MIDWEST	26%
NORTHEAST	23%
WEST	18%

Table 5. Q3: In which region of the country is your library located? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
South Atlantic	17%	20%	17%	17%	17%	14%	21%	16%	13%
East No. Central	16%	12%	17%	17%	12%	16%	15%	19%	17%
Mid Atlantic	15%	18%	23%	16%	18%	13%	18%	19%	23%
West So. Central	10%	10%	14%	11%	15%	10%	12%	10%	20%
Pacific	11%	12%	7%	10%	15%	17%	9%	6%	6%
West No. Central	10%	7%	7%	10%	7%	7%	9%	12%	9%
New England	6%	13%	8%	7%	9%	8%	5%	12%	7%
Mountain	8%	6%	2%	7%	2%	9%	5%	3%	3%
East So. Central	7%	3%	5%	5%	7%	6%	6%	3%	3%
SOUTH/SW	33%	32%	35%	33%	38%	30%	39%	29%	35%
MIDWEST	26%	19%	24%	27%	18%	23%	23%	30%	26%
NORTHEAST	21%	31%	31%	23%	27%	20%	23%	31%	30%
WEST	19%	18%	9%	17%	17%	26%	14%	9%	9%

Respondent Job Title/Ebook Recommendation Authority

Most of the respondents to our survey gave their job title as library media specialist (50%) or teacher librarian (29%). Thirteen percent described themselves simply as “librarian.”

Figure 6. Q3: Which of the following comes closest to your job title? —All school libraries

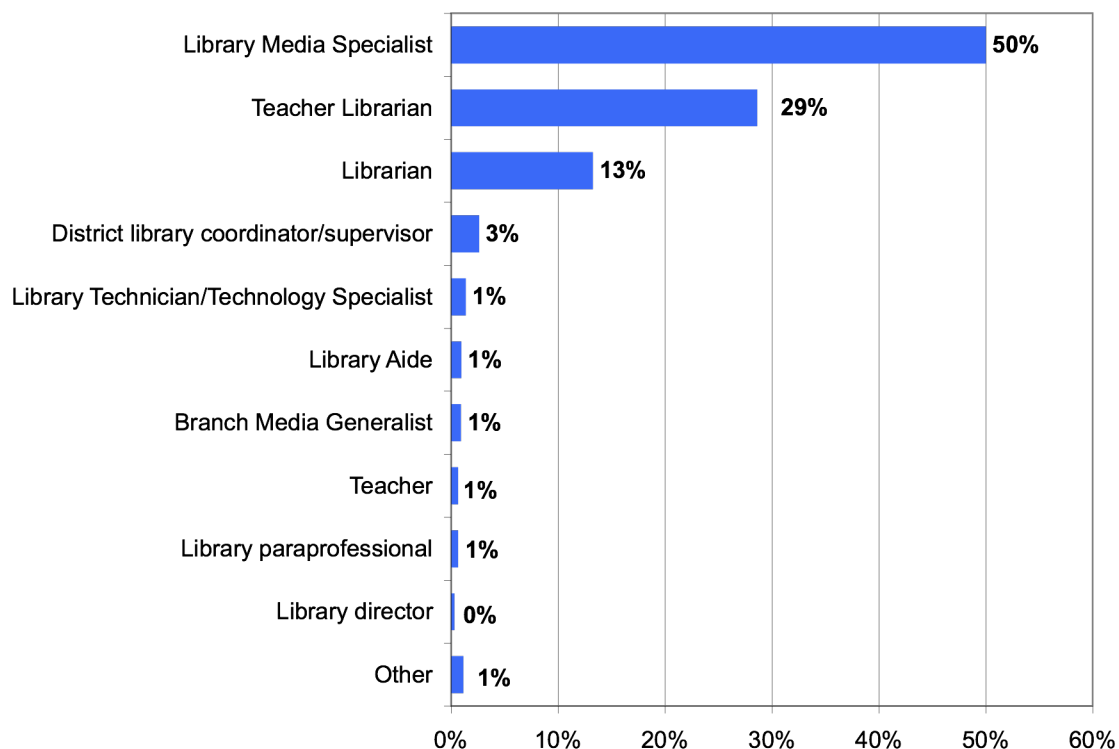


Table 6. Q3: Which of the following comes closest to your job title? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Library Media Specialist	48%	57%	62%	53%	29%	47%	55%	55%	44%
Teacher Librarian	32%	30%	17%	29%	26%	27%	29%	24%	15%
Librarian	13%	9%	16%	11%	34%	15%	12%	14%	14%
District library coordinator/supervisor	1%	0%	1%	3%	0%	1%	2%	4%	22%
Library Technician/Technology Specialist	1%	2%	0%	1%	0%	2%	1%	0%	1%
Library Aide	1%	0%	2%	1%	3%	2%	0%	0%	3%
Branch Media Generalist	1%	1%	1%	1%	3%	2%	1%	1%	1%
Teacher	1%	1%	0%	1%	0%	1%	0%	0%	0%
Library paraprofessional	1%	1%	0%	1%	0%	2%	0%	0%	0%
Library director	0%	0%	1%	0%	3%	0%	0%	1%	1%
Other	1%	0%	1%	1%	2%	1%	0%	1%	0%

Ebook Purchase/Recommendation Authority

The vast majority of respondents (96%) are involved in the ebook purchasing or recommendation process.

Figure 7. Q29: Do you have a role in making purchasing recommendations/decisions for ebooks in your school? —All school libraries

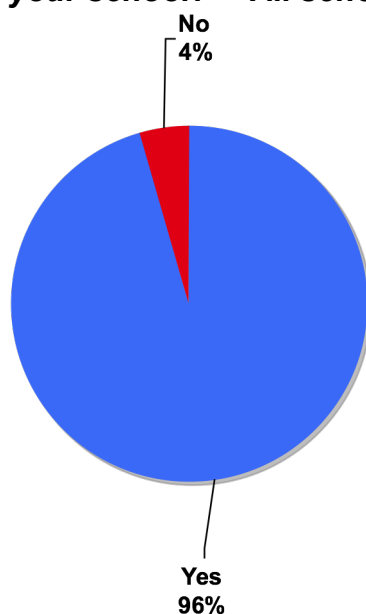


Table 7. Q29: Do you have a role in making purchasing recommendations/decisions for ebooks in your school? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes	94%	97%	98%	96%	96%	95%	99%	95%	97%
No	6%	3%	2%	4%	4%	5%	1%	5%	3%

Onward

Our sample of school libraries is evenly distributed throughout all geographical areas, and includes a very large percentage of ebook decision makers. The survey sample is also comparable in profile to last year's sample, making comparisons that much more valid.

The high concentration of elementary school libraries is likely to give us a reasonably predictive picture of higher level schools in a few years time; the trends in media and book consumption among elementary school students today may be carried along with them throughout their academic careers—and beyond.

The data has been weighted to represent the NCES (National Center for Education Statistics) breakdown of U.S. school libraries, similar to last year, allowing us to draw more sound conclusions about emerging trends.

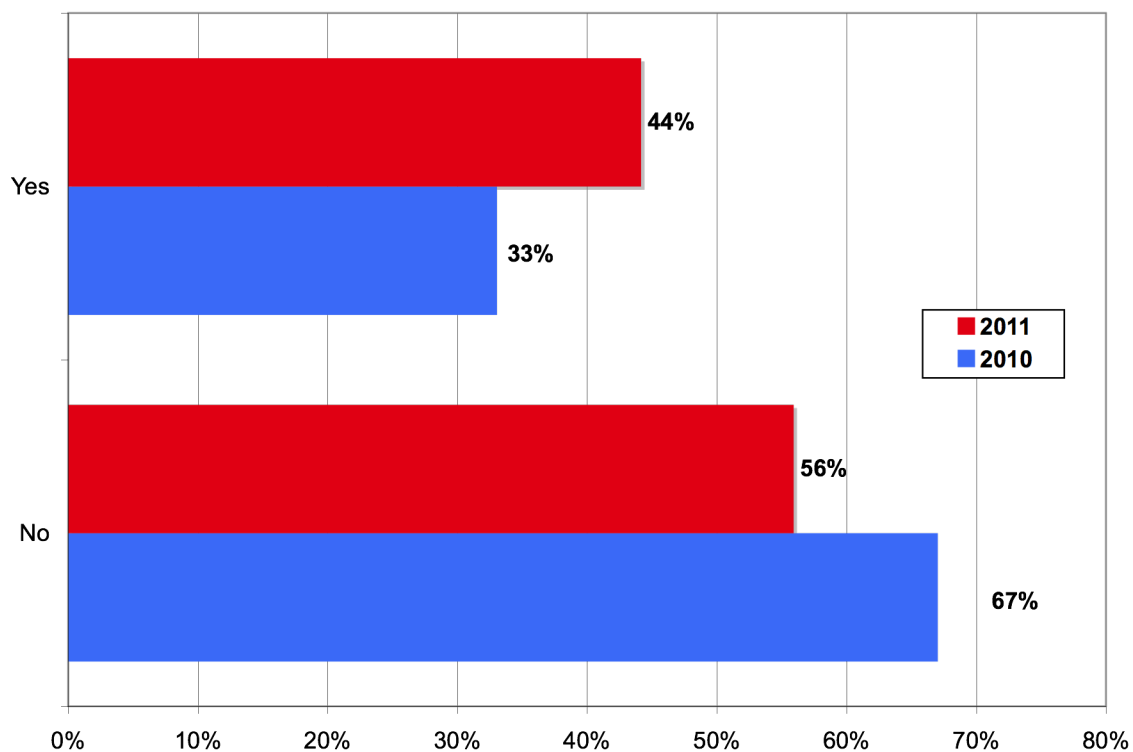
Questions pertaining directly to ebook purchasing habits and vendor preferences (Questions 30 through 39) were answered by respondents who said they are involved in the recommendation/purchasing process of ebooks for their library.

2. EBOOK COLLECTIONS

Offer Ebooks

In the past year, the percentage of school libraries that offer ebooks to users increased from 33% to 44%.

Figure 8. Q7: Does your library currently carry ebooks? —All school libraries

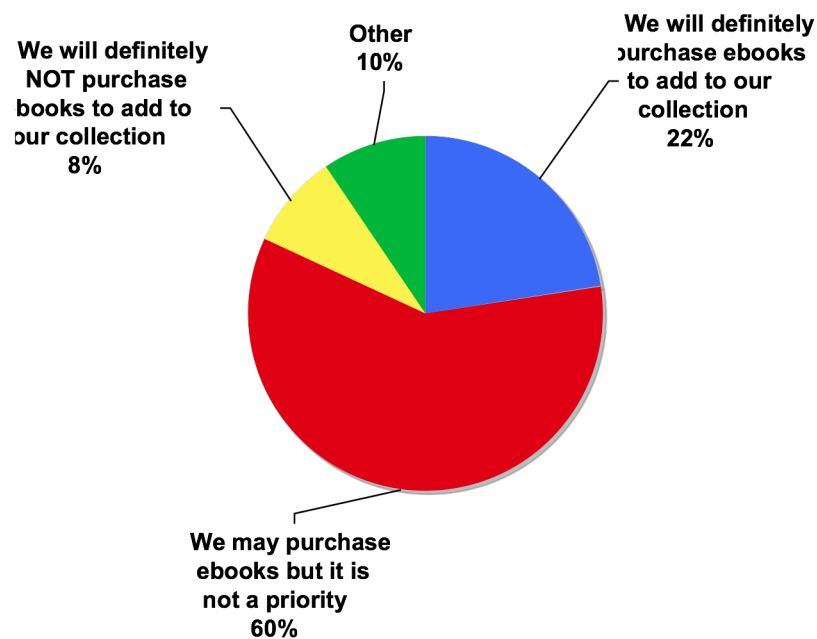


The likelihood of carrying ebooks increases by grade level. Indeed, 71% of high school libraries (up from 66% last year) say they *do* carry ebooks, while 35% of elementary schools (up from 25%) say they do. In many ways, this could be a function of budget; 90% of \$25,000+ libraries offer ebooks, compared to 33% of <\$5,000 libraries. Whether a school is private or public doesn't seem to make much of a difference.

Table 8: Q7: Does your library currently carry ebooks? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Yes	35%	55%	71%	45%	46%	33%	46%	66%	90%
No	65%	45%	29%	55%	54%	67%	54%	34%	10%
2010									
Yes	25%	39%	66%	43%	46%	21%	37%	57%	81%
No	75%	61%	34%	57%	54%	79%	63%	43%	19%

Of those libraries that do *not* currently offer ebooks (56% of all school libraries), 22% say they will definitely be purchasing ebooks to add to their collections in the next two years, while the majority—60%—*may* purchase them, but it's not a priority. Only 8% have ruled out ebook purchasing entirely.

Figure 9. Q42: What are your library's plans for ebook purchases in the next two years? —All school libraries

High schools are the most likely of the three school types to be adding ebooks to their collections in the next two years (36% say “definitely”) although 63% of elementary schools say they “may” add ebooks to their collections.

Table 9. Q42: Do you expect your library will offer ebooks...? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
We will definitely purchase ebooks to add to our collection	19%	41%	36%	23%	28%	19%	31%	39%	50%
We may purchase ebooks but it is not a priority	63%	47%	52%	59%	59%	58%	54%	51%	33%
We will definitely NOT purchase ebooks to add to our collection	9%	8%	10%	9%	5%	13%	7%	3%	0%
Other	10%	5%	3%	10%	8%	10%	7%	7%	17%

As for what prevents school libraries from offering ebooks to their users, most (68%) of school library respondents cite “lack of ereading devices,” followed by “no money for ebooks” (50%). “No demand for them” was cited by 42%.

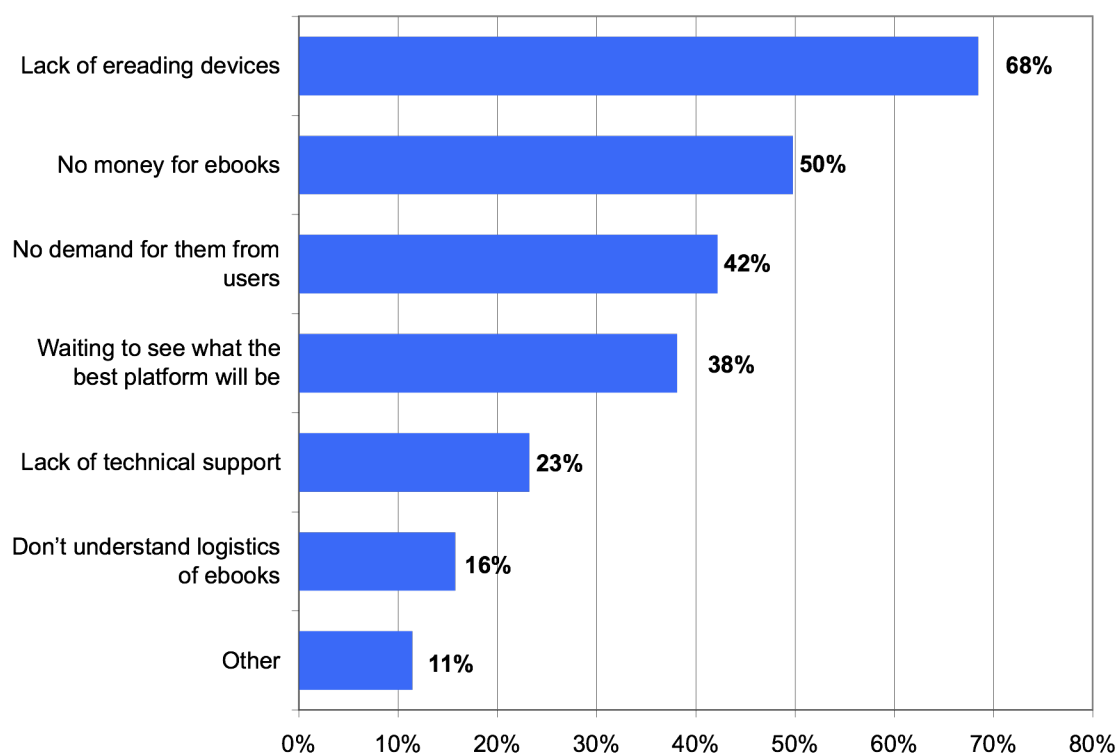
Figure 10. Q41: Why doesn't your library offer ebooks? —All school libraries

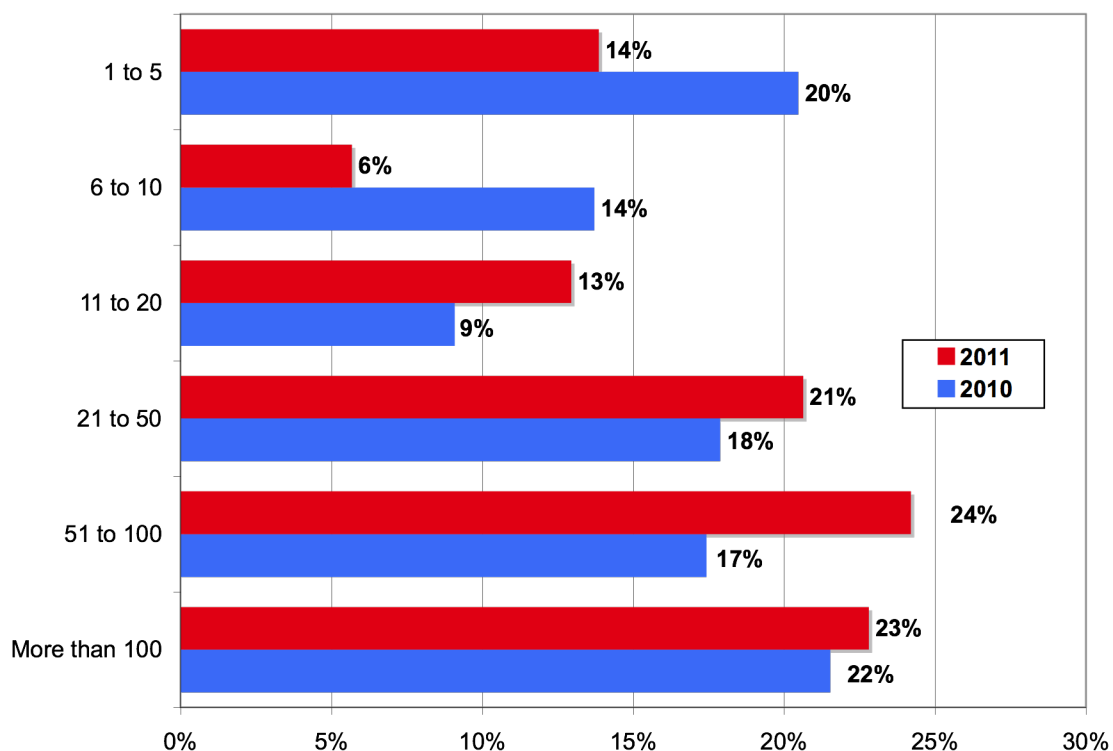
Table 10. Q41: Why doesn't your library offer ebooks? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Lack of ereading devices	69%	67%	71%	70%	61%	72%	71%	60%	33%
No money for ebooks	51%	46%	45%	51%	41%	63%	43%	29%	17%
No demand for them from users	44%	34%	41%	42%	34%	40%	42%	32%	33%
Waiting to see what the best platform will be	36%	38%	52%	38%	42%	32%	46%	51%	50%
Lack of technical support	23%	23%	29%	25%	13%	28%	18%	24%	25%
Don't understand logistics of ebooks	15%	18%	19%	15%	17%	14%	19%	19%	25%
Other	10%	18%	10%	11%	9%	11%	12%	18%	17%

Number of Ebooks Carried

The number of ebooks carried by school libraries has increased eight-fold in the past year, from a mean of 49 (median 32) in 2010 to 397 (median 35) in 2011. Forty-seven percent of school libraries subscribe to or own more than 50 ebooks.

Figure 11. Q7: How many ebooks does your school currently subscribe to or own? —All school libraries



High schools are likely to have many more ebooks than elementary or middle schools. The number of ebooks owned or subscribed to rises with budget. Private schools also have far more ebooks than public schools—2,873 vs. 230 on average.

Table 11. Q7: How many ebooks does your library currently offer users? —School libraries by type of institution and acquisition budget

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
1 to 5	17%	13%	7%	14%	16%	28%	11%	12%	3%
6 to 10	3%	11%	9%	5%	7%	8%	7%	8%	5%
11 to 20	15%	8%	13%	13%	9%	13%	7%	16%	7%
21 to 50	23%	19%	18%	21%	22%	16%	18%	25%	10%
51 to 100	24%	29%	22%	25%	16%	24%	28%	17%	33%
More than 100	18%	19%	32%	22%	29%	11%	29%	22%	43%
Mean	85	119	365	230	2,873	99	132	272	2,492

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Median	35	35	75	35	35	35	75	35	75
2010									
1 to 5	24%	19%	10%	16%	23%	34%	16%	17%	10%
6 to 10	18%	15%	11%	13%	6%	17%	14%	14%	3%
11 to 20	5%	11%	16%	12%	13%	4%	10%	19%	9%
21 to 50	15%	19%	16%	18%	13%	23%	26%	13%	10%
51 to 100	21%	15%	16%	18%	6%	13%	23%	17%	10%
More than 100	17%	21%	31%	23%	40%	9%	11%	21%	57%
Mean	45.0	47.3	59.7	52.1	61.6	31.6	43.7	48.2	84.8
Median	26.8	28.3	43.7	35.5	39.6	9.8	32.3	22.1	106.3

Increased Demand

A question we added to the 2011 survey asked if school libraries had seen any increase in ebook demand from users in the past year. About a quarter (27%) of respondents said that they had indeed seen an increase in demand for ebooks, even of that increase was not especially “dramatic.” More than half of respondents (58%) said they receive no requests for ebooks.

Figure 12. Q8: Have you experienced an increase in requests for ebooks since this time last year? —All school libraries

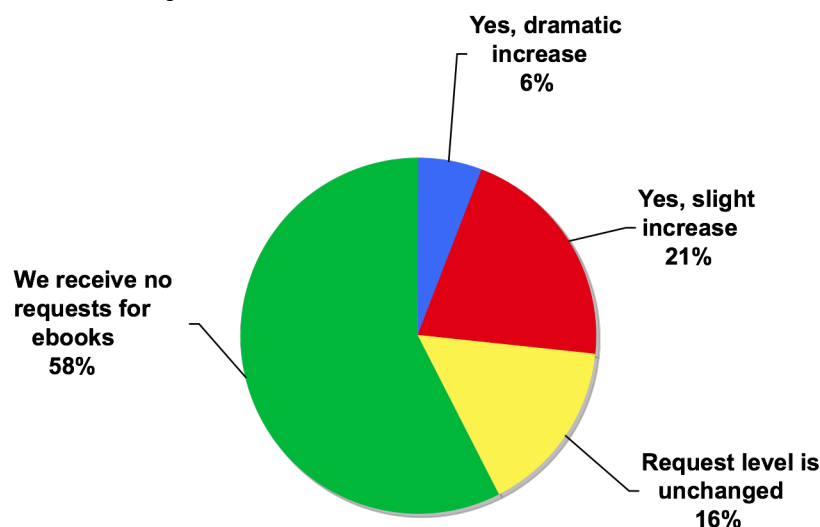


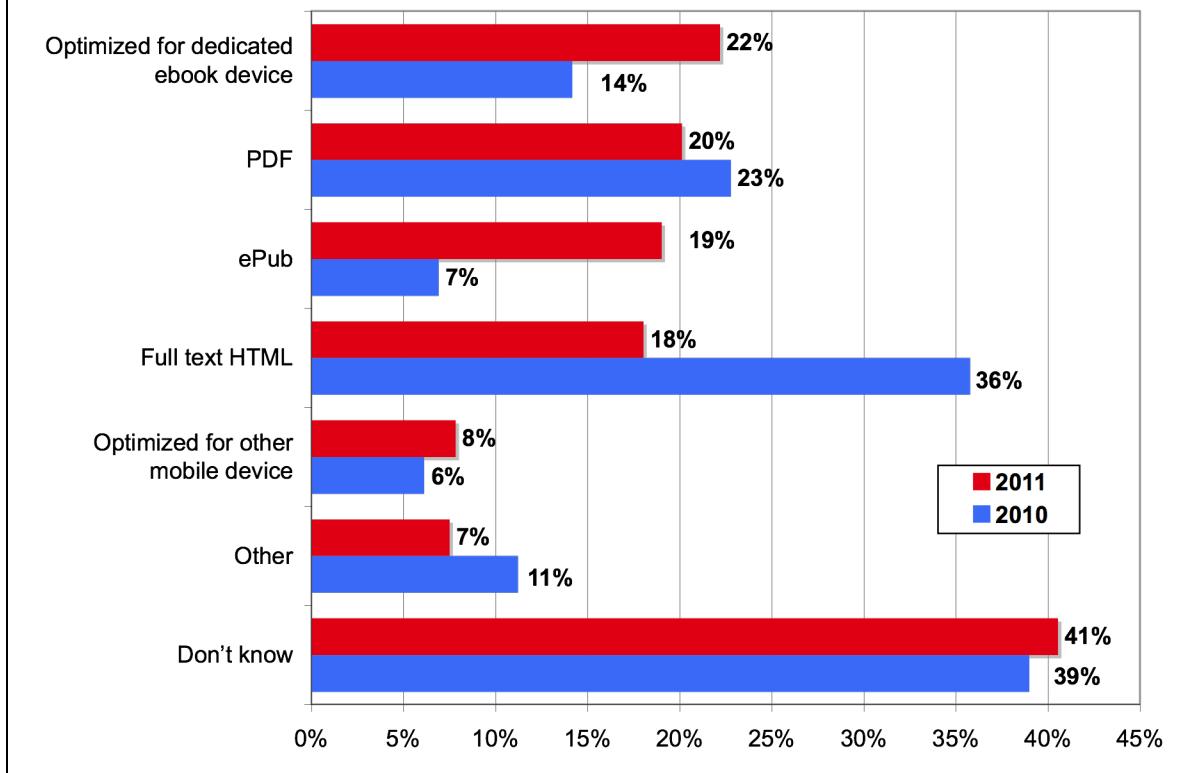
Table 12. Q8: Have you experienced an increase in requests for ebooks since this time last year? —School libraries by type of institution and acquisition budget

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes, dramatic increase	4%	6%	6%	6%	6%	3%	7%	9%	14%
Yes, slight increase	17%	28%	26%	21%	25%	20%	23%	29%	35%
Request level is unchanged	14%	17%	22%	15%	18%	15%	14%	18%	25%
We receive no requests for ebooks	64%	49%	46%	58%	51%	62%	56%	43%	27%

Ebook Formats and Devices

Ebook formats optimized for dedicated ereading devices—like the Kindle or Nook—have quickly become the most preferred formats for school libraries' ebook users, selected by 22% of respondents (up from 14%). PDF has dropped slightly from 23% to 20%, even as ePub has shot up from 7% to 19%. HTML is quickly becoming not necessarily an unpreferred format, but is decreasingly thought of as an ebook. A large percentage, 41%, can't say what their users' preferred formats are; note that in last year's survey, this was phrased as “don't know, ebooks haven't caught on.” Still, one common complaint from school library respondents is the inability to download library ebooks to a preferred (or any) portable ereading device.

Figure 13. Q16: In which format do users generally prefer ebooks? —All school libraries (multiple responses permitted)



“Don't know” responses were consistent across all school levels. “Optimized for dedicated ebook device” peaked at 31% among high school libraries. “Full text HTML” is still tops among high school library users (32%).

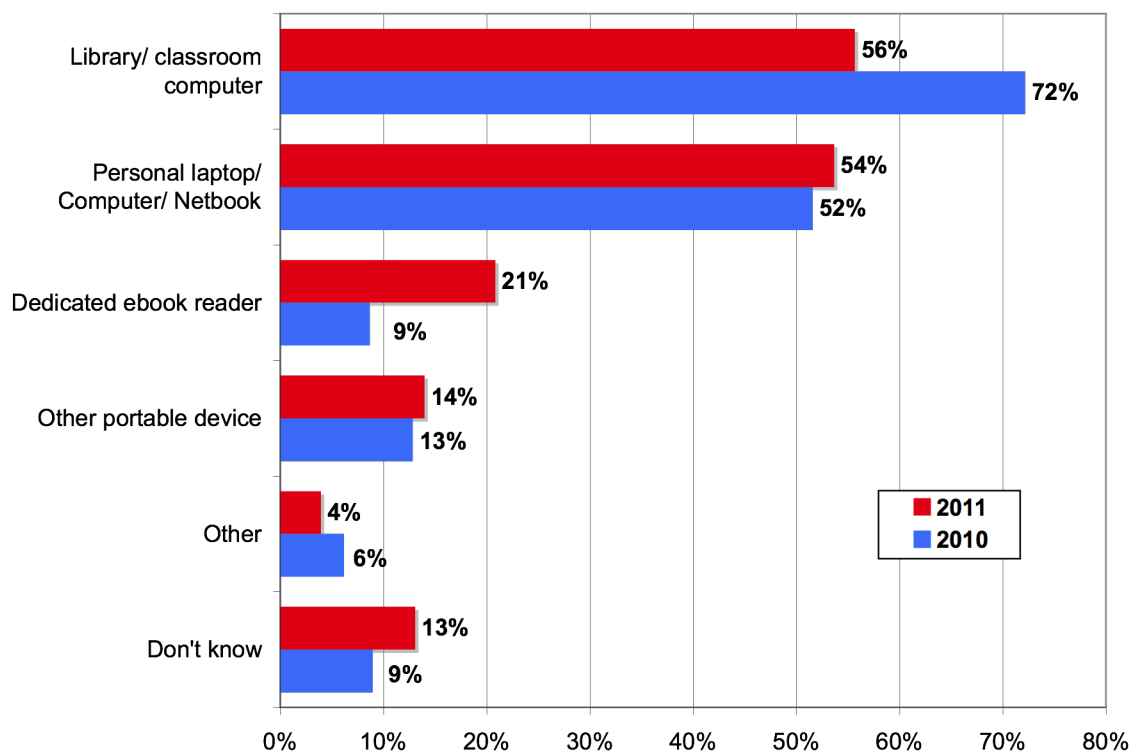
Table 13. Q16: In which format do users generally prefer ebooks?
—School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Optimized for dedicated ebook device	10%	44%	31%	21%	31%	19%	28%	34%	37%
PDF	17%	23%	27%	20%	24%	20%	15%	23%	31%
ePub	19%	25%	14%	20%	8%	15%	20%	20%	19%
Full text HTML	12%	18%	32%	17%	29%	13%	18%	25%	29%
Optimized for other mobile device	2%	15%	11%	8%	4%	6%	9%	10%	23%
Other	11%	5%	1%	8%	2%	9%	4%	4%	4%
Don't know	45%	35%	34%	41%	41%	48%	44%	32%	31%
2010									
Full text HTML	34%	37%	49%	38%	45%	28%	38%	39%	46%
PDF	15%	31%	27%	26%	27%	28%	27%	19%	34%
Optimized for dedicated ebook device	14%	19%	10%	14%	14%	12%	14%	12%	18%
ePub	8%	4%	4%	7%	4%	7%	8%	6%	4%
Optimized for other mobile device	5%	9%	10%	9%	6%	5%	5%	9%	14%
Other	15%	10%	8%	9%	8%	14%	6%	6%	14%
Don't know yet, ebooks haven't caught on	37%	37%	35%	38%	35%	49%	41%	40%	24%

Hardware Devices

The library computer is becoming less popular for reading ebooks, dropping from 72% of respondents last year to 56% this year. The user's own desktop or laptop computer or netbook remains relatively steady at 54%, but as the responses to the last question suggested, a dedicated ebook reader is gaining in popularity, rising from 9% of respondents last year to 21% this year. We also note that 13% (up slightly from 9%) of respondents don't know which hardware is preferred.

Figure 14. Q17: What device(s) do your library users most often use to read ebooks? —All school libraries (multiple responses permitted)



Middle school students are the most likely to use dedicated ebook readers (36%, up from 15%). And among high school students, 29%—up from 7%—use dedicated ebook readers. Whether these ereaders are personally owned or borrowed from the library is unknown.

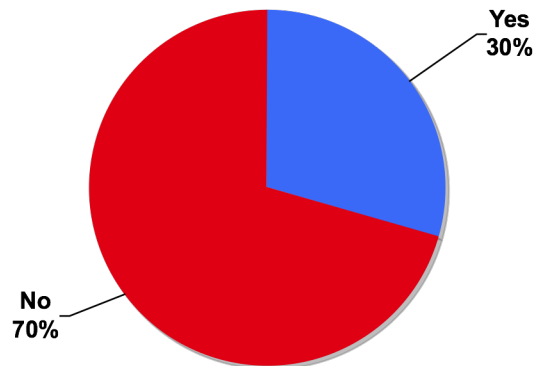
Table 14. Q17: What device(s) do your library users most often use to read ebooks? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Library/classroom computer	59%	47%	56%	57%	36%	47%	54%	51%	60%
Personal laptop/Computer/Netbook	53%	49%	56%	54%	60%	43%	56%	55%	58%
Dedicated ebook reader	10%	36%	29%	19%	38%	25%	23%	31%	36%
Other portable device	11%	13%	16%	13%	19%	13%	12%	16%	25%
Other	6%	1%	1%	4%	2%	4%	3%	3%	1%
Don't know	15%	12%	10%	13%	11%	17%	13%	11%	6%
2010									
Library computer	73%	62%	78%	75%	66%	72%	69%	74%	76%
Personal laptop/Computer/Netbook	54%	57%	59%	50%	70%	40%	58%	53%	62%
Other portable device	17%	10%	12%	10%	24%	7%	6%	10%	25%
Dedicated ebook reader	8%	15%	7%	7%	16%	5%	10%	8%	11%
Don't know	7%	13%	8%	11%	2%	12%	15%	6%	6%
Other	8%	0%	1%	4%	4%	9%	4%	0%	6%

Download Ebooks to Personal Devices

In our 2011 survey, we asked if students were allowed to download ebooks to their own personal devices. While the responses to the last two questions suggest yes, as far as our school library respondents are concerned, the answer is no: 70% said they did not. Thirty percent said they did. However, this is not their choice; they are often constrained by publishers' and vendors' use policies.

Figure 15. Q18: Do you allow students to download ebooks to their personal devices? —All school libraries



Allowing students to download library ebooks to their own devices only rises modestly by school level, peaking at only 37% of high schools.

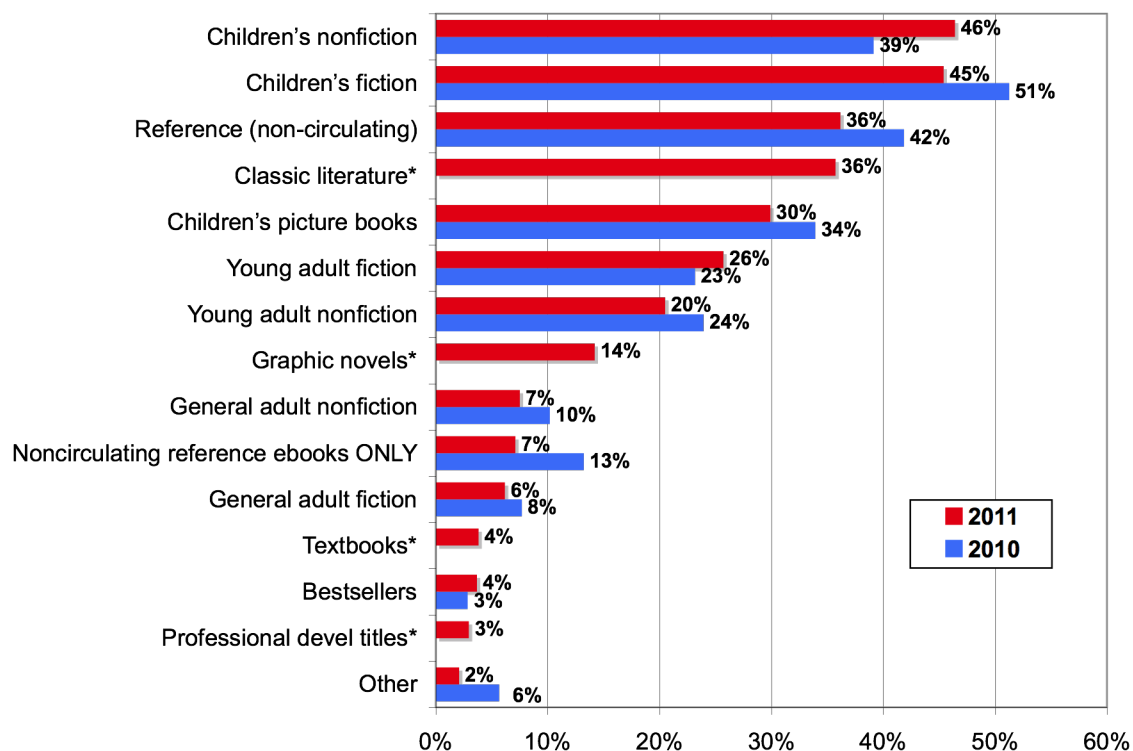
Table 15. Q18: Do you allow students to download ebooks to their personal devices? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes	24%	34%	37%	29%	32%	32%	30%	39%	31%
No	76%	66%	63%	71%	68%	68%	70%	61%	69%

Ebook Categories

Children's nonfiction edged out children's fiction this year as the top category of ebooks that school library media centers offer users—children's nonfiction grew from 39% last year to 46% this year, while children's fiction dropped from 51% to 45%. Children's picture books dropped from 34% to 30%, but we added classic literature to this survey and it came in at 36%. Graphic novels, another new addition, was selected by 14% of school library respondents.

Figure 16. Q9: Which categories of ebooks does your library media center currently offer users? —All school libraries (multiple responses permitted)



*Added to 2011 survey.

Naturally, elementary schools are more likely to circulate children's fiction and nonfiction, while high schools emphasize reference titles and young adult fiction and nonfiction. For middle schools, young adult fiction is the top category offered.

Elementary school libraries put extra emphasis on acquiring children's nonfiction last year, while middle school and high schools both reinforced their young adult fiction ebook collections.

Table 16. Q9: Which categories of ebooks does your library currently offer users? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Children's nonfiction	73%	23%	4%	48%	11%	34%	44%	24%	17%
Children's fiction	68%	33%	5%	47%	11%	39%	39%	25%	20%
Reference (non-circulating)	16%	37%	75%	34%	70%	25%	36%	55%	74%
Classic literature	30%	47%	39%	36%	34%	43%	41%	36%	44%
Children's picture books	46%	12%	5%	31%	8%	25%	25%	15%	15%
Young adult fiction	8%	53%	39%	26%	28%	29%	36%	36%	51%
Young adult nonfiction	3%	38%	41%	20%	32%	24%	21%	37%	40%
Graphic novels	15%	18%	8%	15%	4%	8%	20%	10%	15%
General adult nonfiction	2%	6%	18%	7%	21%	8%	6%	11%	19%
General adult fiction	2%	6%	13%	6%	13%	5%	6%	10%	14%
Textbooks	2%	3%	5%	3%	6%	4%	2%	5%	10%
Bestsellers	0%	4%	9%	4%	6%	5%	2%	8%	10%
Professional devel titles	3%	3%	1%	3%	2%	3%	4%	1%	4%
Other	1%	1%	3%	2%	4%	5%	2%	2%	5%
Noncirculating reference ebooks ONLY	0%	11%	18%	6%	21%	5%	8%	14%	17%
2010									
Children's fiction	80%	27%	4%	32%	15%	40%	41%	23%	22%
Reference (non-circulating)	20%	51%	81%	54%	79%	42%	36%	65%	79%
Children's nonfiction	64%	18%	3%	25%	15%	29%	34%	17%	20%
Children's picture books	56%	14%	3%	19%	12%	29%	23%	12%	14%
Young adult nonfiction	11%	37%	50%	35%	37%	22%	29%	38%	46%
Young adult fiction	17%	39%	28%	29%	21%	24%	29%	23%	36%
General adult nonfiction	5%	11%	23%	12%	29%	11%	9%	16%	24%
General adult fiction	3%	10%	14%	10%	15%	13%	10%	8%	14%
Bestsellers	0%	1%	6%	3%	10%	4%	1%	3%	9%
Other	3%	7%	9%	8%	8%	9%	11%	5%	8%
Noncirculating reference ebooks ONLY	3%	18%	32%	20%	27%	22%	11%	24%	25%

Marketing Ebooks

For marketing the availability of ebooks in their libraries, just over one-half (53%) “market” their ebook collection during classroom instruction, while 47% rely on their general online catalog. Thirty-two percent have a link to their digital collection on the library’s website. Still, 28% of school library media centers do not (or do not yet) market their ebooks specifically.

We changed the choices in this question from last year’s survey, so in the interest of clarity we present only the 2011 data in Figure 17. Last year, most school libraries surveyed (81%) used their basic catalog, while 24% used a library newsletter. A similar number (23%) offered an ebook catalog on the library’s website.

Figure 17. Q22: How does your library market the availability of ebooks in your library? —All school libraries (multiple responses permitted)

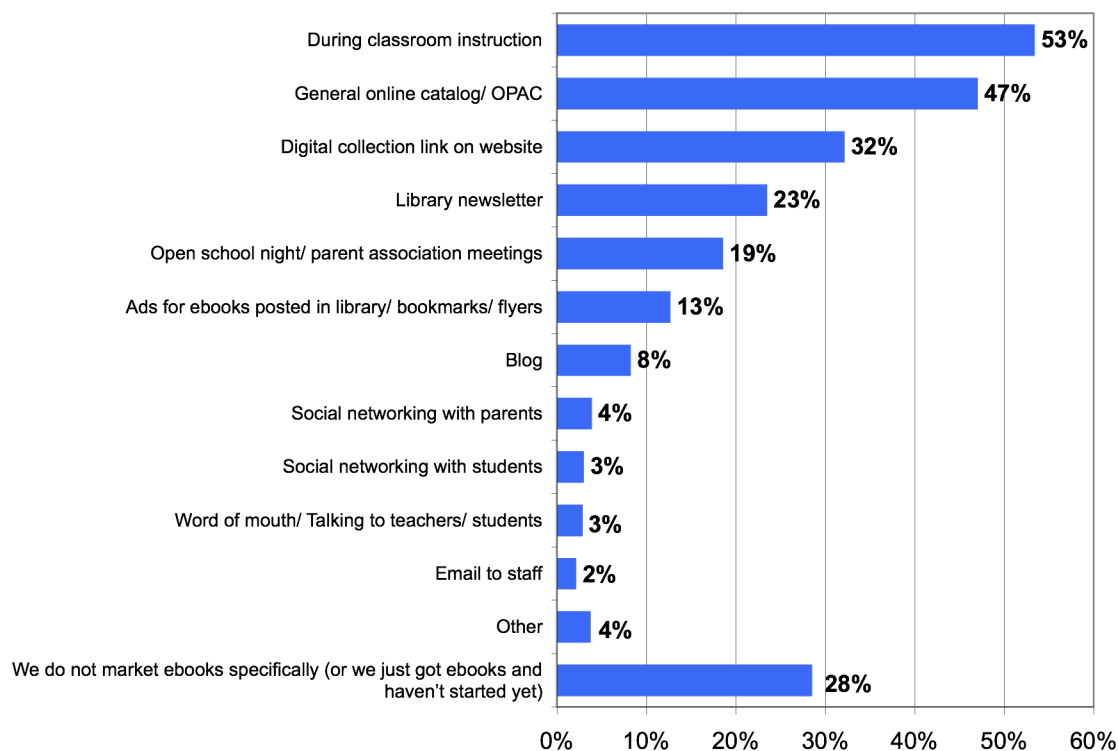


Table 17. Q22: How does your library market the availability of ebooks in your library? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
During classroom instruction	49%	55%	62%	52%	62%	49%	55%	59%	59%
General online catalog/OPAC	39%	45%	66%	46%	55%	41%	53%	55%	57%
Digital collection link on website	26%	30%	45%	32%	38%	25%	36%	38%	48%
Library newsletter	24%	21%	24%	23%	17%	20%	31%	21%	21%
Open school night/parent association meetings	21%	13%	13%	17%	23%	13%	18%	17%	17%
Ads for ebooks posted in library/ bookmarks/ flyers	7%	15%	21%	13%	9%	11%	16%	19%	22%
Blog	7%	10%	10%	9%	4%	7%	10%	12%	6%
Social networking with parents	4%	1%	5%	4%	0%	4%	2%	4%	4%
Social networking with students	0%	5%	9%	3%	0%	5%	3%	6%	7%
Word of mouth/Talking to teachers/students	3%	1%	2%	3%	0%	3%	2%	2%	4%
Email to staff	2%	1%	3%	2%	0%	4%	0%	2%	2%
Other	4%	3%	2%	4%	4%	0%	1%	6%	4%
We do not market ebooks specifically/we just got ebooks and haven't started yet)	33%	30%	19%	29%	21%	33%	26%	22%	23%
2010									
General online catalog/OPAC	79%	77%	84%	81%	86%	80%	87%	79%	84%
Library newsletter	24%	23%	24%	25%	18%	22%	17%	27%	24%
Unique ebook catalog on website	24%	20%	22%	22%	25%	9%	22%	21%	35%
Ads for ebooks posted in library/ Bookmarks/ Fliers	19%	20%	24%	20%	22%	24%	14%	18%	25%
Classes Student demo/instruction	2%	8%	8%	5%	10%	4%	3%	8%	7%
Library website/ weblinks	2%	6%	6%	5%	4%	9%	0%	7%	3%
Social networking	3%	7%	6%	3%	12%	7%	3%	3%	8%
Word of mouth	0%	4%	3%	3%	0%	2%	1%	4%	1%
Other	8%	14%	10%	9%	14%	13%	12%	7%	13%

General Conclusions

Currently, less than half (44%) of school libraries offer ebooks, but that number is expected to grow, especially at the high school level. The number of titles schools added over the last year increased exponentially. Children's nonfiction and fiction, reference and classic literature are the ebook subjects most likely to be found in U.S. schools.

School's ebooks are being read mostly on library/classroom computers, personal computers/laptops and dedicated ebook readers. The percentage using ebook readers increased from 9% in 2010 to 21% in 2011.

In Their Own Words...

On our questionnaire, we asked libraries to share their overall thoughts about ebooks in their school media centers or libraries. We present a sampling of them, here, and at the ends of Chapters 3 and 4 (lightly edited).

- So far I do not see a need in the elementary school. However I think we are trending in this direction, and as such more titles will need to be published for the elementary market. I just don't see my Kindergartners snuggled up in bed with their ereaders
- I think that ebook use will continue to rise. Ereaders are also catching on, and circulation for both nonfiction and fiction titles on ereaders is increasing.
- The ebook revolution depends on the equipment and my very poor children do not have access. They would love it and so would I.
- We're hoping that a new library checkout and catalog system that we are acquiring this summer will be more conducive to the use of ebooks in the library as well and the classroom. Currently we are having technology issues (bandwidth and firewall) that make ebooks difficult to access. Our new library program from Follett/Destiny promises to have a patron friendly ereader component.
- I am surprised how many students know someone who has an ebook. Students are fascinated by ebooks even if they don't check them out.
- We are just starting to purchase and incorporate ebooks into our middle and high school grades. The problem I am running into is that they are so expensive. The way I plan on introducing them to students is by purchasing ebooks on topics that they will be researching. Then, if they are something students would like, I might branch off into fictional titles. I really don't see our students reading ebooks for enjoyment, until more of them have personal ereading devices (which most of them don't). Maybe in the future, this will be an option.
- Ebooks are not a viable medium for middle school age students now. Devices are too costly and the students would drop/break/lose them.

Doesn't really make sense for this age group unless industrial strength device is manufactured.

- I would really love to move on to fiction ebook lending, since we have a lot of reference ebooks but they do not circulate. Many factors are currently standing in the way from me branching out to fiction ebooks: 1. Budget. My budget gets slashed dramatically each year. Plus, I don't see why ebooks for libraries are priced so much higher than personal ebooks one may buy through Amazon or B&N. I understand the licensing is different, but I can't imagine why some vendors are pricing ebooks at higher than print books, which I've seen many times. 2. Licensing. I refuse to buy into the "You don't technically own this title" model, like HarperCollins is offering. I have books that circulate well over 26 times a year. With a lack of budget, how am I supposed to buy these again? 3. Usage. I just don't know how many students have their own ereader devices right now. And with that, of those that I do know own them many are Kindles, which will not allow ePub borrowing, so that defeats the purpose: "Hey Susie, yes we have ebooks you can borrow, and how nice you got an ereader for your birthday, but you won't be able to read our ebooks on it because it's a Kindle."
- The other option I could adopt is the preloaded Kindles or Nooks, but I'm still on the fence. I know she has parents sign documents about students breaking, losing, misusing, etc the readers. I have students who have lost print books, and even though we have school policies about this, my administration does not "go out of their way" to ensure I am paid for the lost copies. Sometimes, I "eat" the loss. How will I do that with \$120 ereaders?
- The vast majority of my students do not own personal devices to use with downloadable ebooks. Students and faculty do not want to read ebooks on computers (the Follett model).
- School libraries are currently not allowed to join consortia here in Illinois. This lack of ability to share resources, as we always have with print via Interlibrary Loan, is very problematic for us.
- I think we're in the incunabula period with e-books. Standardizing a format and DRM model is what we're waiting for.
- My students have shared with me that they would be more likely to download an audiobook than an ebook. This is the reason I have not purchased many ebooks for the collection.
- This is the first year I've taken a serious look at ebooks. The media has publicized the increase in number of middle school aged students who now have ebook readers. It is an area I want to really promote next year. It is time to catch up.
- I currently have only a few classic ebook novels, I would like to be able to offer books for students to use on their own devices but given the state

of school and library funding in Michigan, I don't see it happening anytime in the foreseeable future.

- We plan to purchase more ebooks from Follett soon. These will be multiple copies of titles on the summer reading list. Hopefully, this will increase participation in the summer reading program.
- 2 of our 4 Kindles didn't last four months in a middle school/high school check out. We will replace them for free.
- There is a huge issue with tax exempt orders—B&N has a rather round-about method. Ordering and downloading one book at a time is a pain.
- I purchased a large collection of reference (GALE) two years ago and a few required reading titles last year. This year I added quite a few fiction and pleasure reading titles to my e-book collection because I think this is the future, but found out they are not downloadable to devices. I probably won't buy any more fiction e-books from companies that don't offer them downloadable to a reader of some type.
- I wish I had materials such as posters, online and hard copy, to advertise ebooks and the steps needed to use them.
- If students or staff have a public library card, they can download from the public library. The school libraries have a partnership with the public library so we can see all the titles available through our OPAC. School Libraries do not yet have any ebooks available on OPAC. I have one Kobo reader in our school which has not been catalogued.
- Our public school library center earned a Color Nook by having our book fair at Barnes and Noble. The only books that are on the library Nook at free childrens and YA books. Price is a huge factor for public schools.
- Ebooks are an especially difficult topic to broach in a media center. With school budgets being so tight and students' needs so specific, it is difficult to make decisions about where to invest the money we do have available for usage in our budgets. I would love to have more guidance and insight into how other libraries are building their ebook collections while still maintaining their print collection integrity. It is difficult to spend the money necessary to purchase an ebook collection of something that the library already has in print format, even though students are often more comfortable with digital formats of nonfiction materials.
- I have some free ones from my vendor but have no device currently to download. I also have so little time to teach myself more about ebooks although I know that I will have no choice but to embrace and offer them in the next year or so
- This is really only something that we are starting to explore in our district at the end of this year (beginning of next) with 1 school purchasing OverDrive. Otherwise, we've only really been using Gale eBooks via

GVRL, which includes some titles purchased by schools, but mainly titles available via our state library.

- Currently, I have had very good success with electronic reference books. I need these titles to have the capacity for multiple users at the same time and to have perpetual access to all titles that I purchase. I don't have any fiction ebooks at this time, but plan to purchase for the next school year. I think that different rules can apply for fiction.
- In the spring of this year, I ordered three Kobo ereaders for my libraries. Two are at the high school and one is at the middle school. Because these are so new to the libraries, and because it is the end of the school year, currently ereaders can only be checked out to faculty. But, at the beginning of the year, the ereaders will be available to students. A parent permission form and a circulation policy have been created and approved by the principals, so the ereaders are ready to be used by students, but just not at this point in time.
- We have recently decided to buy most curriculum-supported materials in e-book format, so we will be buying fewer print resources. We had already decided not to buy any more reference in print.
- They are a wild success and make the program look great.
- I wish I could get more patrons to give it a try, but the Follett reader is not user-friendly. Next year we introduce iPads. Will that make a difference? Stay tuned.
- I really hope the industry can standardize the ereading of the ebooks. It is so difficult to make it work consistently and we are struggling.
- Every librarian I know is interested in ebooks, we are just waiting for a licensing agreement we can afford.
- Due to the decrease in library staff members over the past year—it is nearly impossible for 1 person to keep up with all the changes in the ebook market. While this may be a practical solution for our library, until staff has the opportunity to investigate the options further, this will not become a reality.
- I would definitely consider expanding our ebook collection to allow students to download to their personal readers. I struggle with the inconsistency of the format for each readers. Our students use a variety and it difficult and certainly not cost justified to purchase for all.
- I wanted to buy and load an ereader with books and circulate it that way, but after learning that practice is not permitted by licensing, I am back to the drawing board.
- We will be promoting ebooks at the beginning of next year. Our school will have devices available for student checkout, which will have big impact on ebook usage.

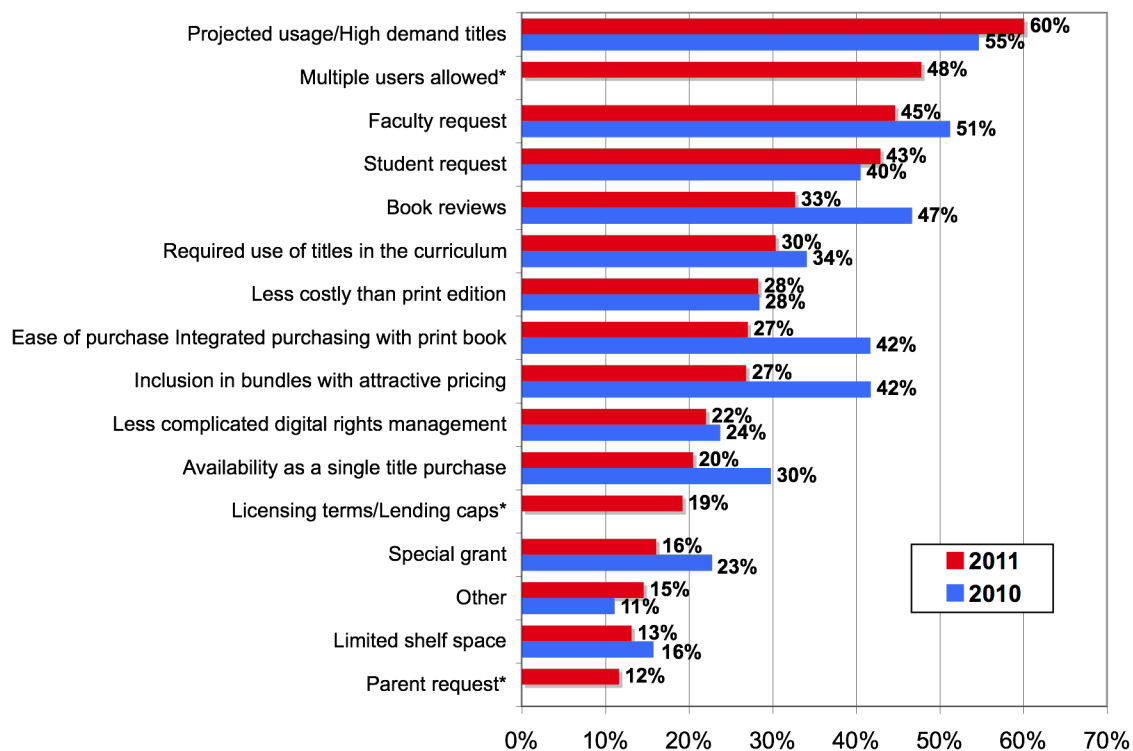
- At this time we don't have any ebooks. We have one ereader in the building for special students. We are looking at adding some for the next school year. We are currently using a limited database which will be upgraded next year allowing for e book access.
- Students in middle school still do not recognize ebooks when they see them. If they stood out or if they were assigned then usage would be up. If county requirements specified specific ebooks for curriculum objectives then usage would be up. They need to be incorporated somehow before anyone will use them in the elementary grades.
- We are very rural—no wireless or broadband access, so we are just beginning this process, and I can't reliably predict the future.
- Managing e-books is taking up a larger and larger portion of my time. Currently we have e-books from multiple publishers, including Gale, Marshall Cavendish, ABC CLIO, Salem, and Infobase. Plus, we now have Kindles with ebooks that we have purchased from Amazon, and we have several ebook titles purchased from Follett. Each ebook provider has a separate user interface with different features, making the whole e-book "stew" quite complicated for both users and the library.
- We have access through our local BOCES services. I have not been trained on how to access and use them. I would order ebooks if I had more training. I would then know how to market them to my faculty and students.
- We are able to get excellent pricing through Lyrasis for NetLibrary ebooks. We purchase from 3,000 to 4,000 per year.

3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

Acquisition

The top factor that influences a school library's decision to purchase an ebook is "usage statistics/projected usage," selected by 60% of respondents, up from 55% last year. We added "multiple users allowed" to the 2011 survey, and it was the number two influencing factor, selected by 48% of respondents. This is followed by "faculty request" (45%, down from 51%) and "student request" (43%, up from 40%). "Book reviews" have become less of an influencing factor—they dropped from 47% to 33% of respondents in the past year. We said last year that many schools were adding ebooks not so much due to then-current demand, but in anticipation of future demand. As we have seen elsewhere in this report, that demand is starting to manifest itself.

Figure 18. Q33: What factors influence your decision to purchase ebooks for your media center? —All school libraries (multiple responses permitted)



*Added to 2011 survey.

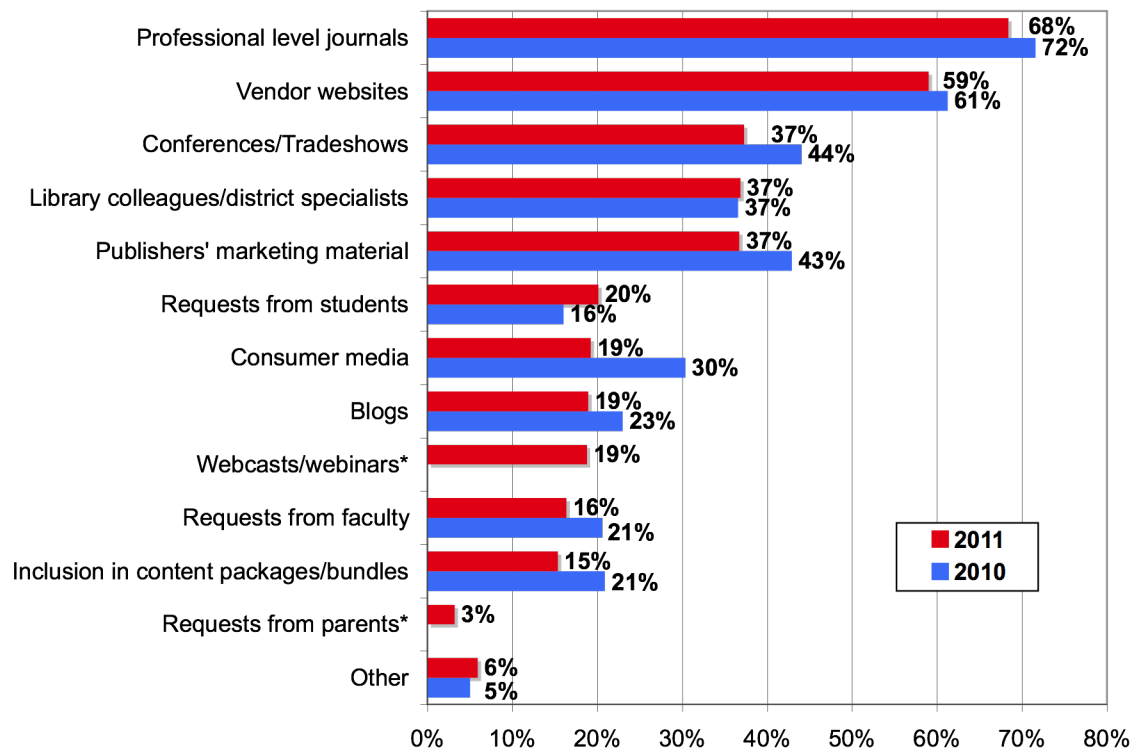
Table 18. Q33: What factors influence your decision to purchase an ebook for your media center? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Projected usage/High demand titles	52%	67%	72%	60%	55%	48%	67%	71%	69%
Multiple users allowed	42%	46%	61%	47%	52%	33%	52%	52%	69%
Faculty request	47%	38%	44%	46%	33%	43%	42%	42%	52%
Student request	39%	51%	46%	45%	26%	39%	48%	44%	52%
Book reviews	30%	30%	39%	33%	31%	26%	37%	38%	34%
Required use of titles in the curriculum	29%	29%	32%	30%	33%	20%	26%	36%	43%
Less costly than print edition	23%	29%	34%	27%	38%	26%	36%	34%	30%
Ease of purchase									
Integrated purchasing with print book	25%	21%	37%	27%	29%	19%	27%	32%	34%
Inclusion in bundles with attractive pricing	23%	27%	33%	25%	50%	17%	27%	32%	39%
Less complicated DRM	18%	26%	24%	22%	26%	20%	28%	22%	30%
Availability as a single title purchase	21%	19%	20%	20%	24%	14%	17%	23%	25%
Licensing terms/Lending caps	17%	30%	15%	20%	21%	17%	19%	25%	18%
Special grant	17%	18%	13%	17%	7%	17%	13%	19%	9%
Limited shelf space	10%	14%	17%	13%	19%	9%	18%	10%	23%
Parent request	14%	12%	6%	11%	7%	9%	14%	7%	12%
Other	17%	10%	13%	15%	14%	19%	13%	9%	14%
2010									
Usage statistics/Projected usage	51%	52%	60%	58%	55%	50%	56%	59%	58%
Faculty request	53%	48%	49%	50%	51%	43%	50%	48%	58%
Book reviews	47%	41%	44%	47%	34%	30%	47%	49%	42%
Inclusion in bundles with attractive pricing	36%	48%	53%	42%	62%	30%	41%	54%	47%
Ease of purchase									
Integrated purchasing with print book	38%	45%	51%	46%	40%	33%	47%	45%	47%
Student request	40%	41%	36%	42%	30%	35%	42%	39%	44%
Required use of titles in the curriculum	35%	27%	37%	35%	32%	18%	27%	44%	39%
Availability as a single title purchase	29%	36%	31%	31%	34%	33%	23%	36%	30%
Less costly than print editions	27%	29%	38%	32%	36%	38%	28%	35%	32%
Relaxed DRM that allows printing or downloading	18%	23%	36%	30%	26%	20%	17%	37%	35%
Special grant	25%	24%	15%	24%	9%	28%	17%	23%	17%
Limited shelf space	13%	21%	22%	16%	36%	10%	14%	18%	30%
Other	7%	12%	14%	11%	15%	33%	8%	6%	14%

Learn About Ebooks

The top methods that school libraries use to find and learn about ebooks are “professional level journals” (72%, down four percentage points from last survey) and “vendor web sites” (59%, down two percentage points). Almost all of the items on this list are down from last year—except “requests from students,” which rose four percentage points to 20% of respondents.

Figure 19. Q34: How do you generally find and learn about ebooks? —All school libraries (multiple responses permitted)



Middle school libraries are more likely (34%, up from 23%) to learn of ebooks from students. High school libraries are more likely to learn about ebooks from publishers' marketing material, conferences/tradeshows and webcasts/webinars.

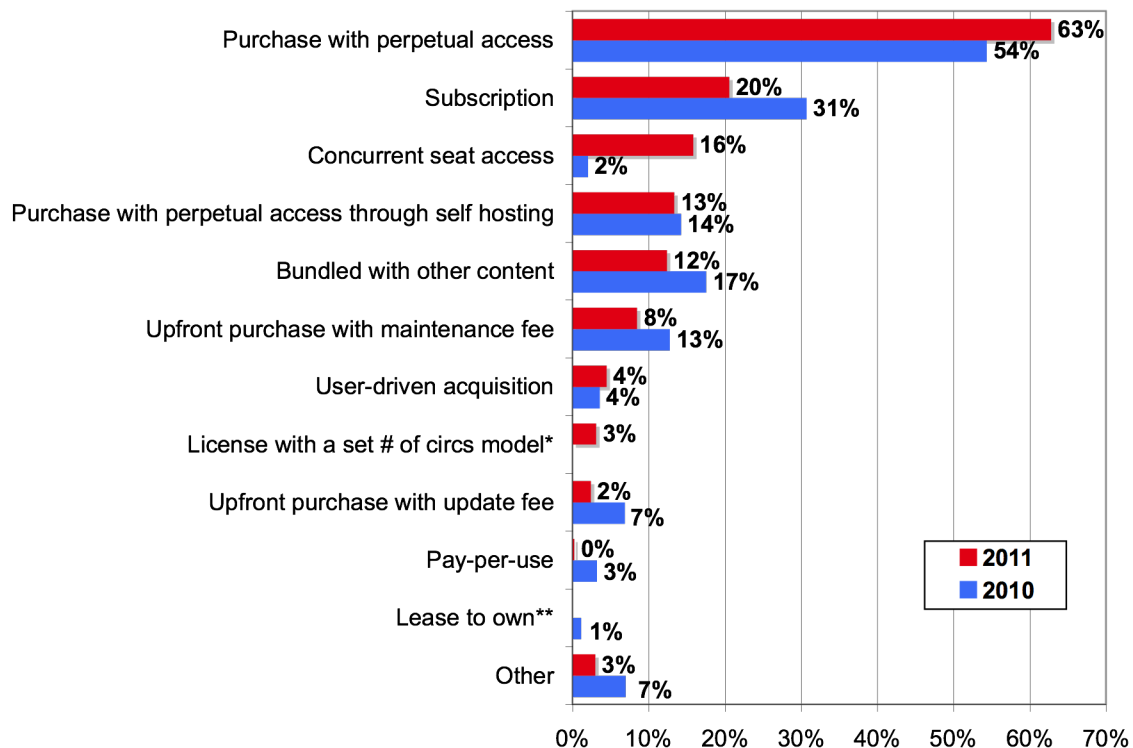
Table 19. Q34: How do you generally find and learn about ebooks?
—School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Professional level journals	65%	75%	71%	67%	75%	63%	65%	74%	76%
Vendor websites	65%	51%	53%	59%	53%	57%	53%	56%	54%
Conferences/Tradeshows	36%	23%	44%	37%	38%	36%	33%	38%	50%
Library colleagues/district specialists	32%	43%	40%	37%	30%	36%	40%	42%	37%
Publishers' marketing material	36%	20%	48%	36%	38%	27%	29%	43%	45%
Requests from students	16%	34%	20%	21%	18%	21%	27%	22%	24%
Consumer media	18%	22%	21%	19%	18%	22%	18%	20%	20%
Blogs	19%	23%	18%	18%	18%	18%	19%	18%	17%
Webcasts/webinars	14%	13%	27%	19%	20%	18%	23%	20%	29%
Requests from faculty	16%	20%	17%	16%	15%	19%	17%	15%	18%
Inclusion in content packages/bundles	9%	16%	24%	15%	35%	4%	14%	21%	41%
Requests from parents	4%	4%	1%	3%	0%	4%	5%	1%	1%
Other	6%	4%	6%	5%	10%	7%	2%	5%	8%
2010									
Professional level journals (book reviews/mentions)	70%	68%	73%	70%	77%	64%	57%	81%	76%
Vendor websites	70%	48%	58%	56%	49%	49%	63%	54%	50%
Conferences/Tradeshows	46%	42%	41%	44%	45%	46%	40%	40%	53%
Publishers' marketing material	43%	61%	51%	46%	57%	56%	41%	47%	47%
Library colleagues/district specialists	33%	47%	34%	39%	32%	36%	35%	41%	36%
General interest news & journals (book reviews/mentions)	33%	26%	23%	30%	21%	33%	30%	25%	30%
Blogs	24%	26%	14%	20%	21%	23%	29%	16%	18%
Inclusion in content packages/bundles	19%	30%	33%	23%	43%	5%	21%	29%	38%
Requests from faculty	22%	23%	15%	20%	17%	13%	14%	24%	23%
Requests from students/users	17%	23%	11%	16%	13%	10%	17%	17%	17%
Other	2%	5%	8%	8%	2%	8%	5%	6%	8%

Ebook Purchasing Terms

When libraries purchase ebooks, more often than not (63% of all respondents) they purchase “perpetual access,” and this is growing (54% last year). Twenty percent purchase a subscription, but this is becoming less popular (down from 31%). “Concurrent seat access” has grown substantially, from 2% last year to 16% this year.

Figure 20. Q35: What type of purchasing terms does your library typically use when acquiring ebooks? —All school libraries (multiple responses permitted)



*Added to 2011 survey.

**Included on 2010 survey only.

All three school levels are most likely to purchase ebooks with perpetual access. High schools are more likely than the lower grades to purchase “concurrent seat access” (29%, up from just 5% last year).

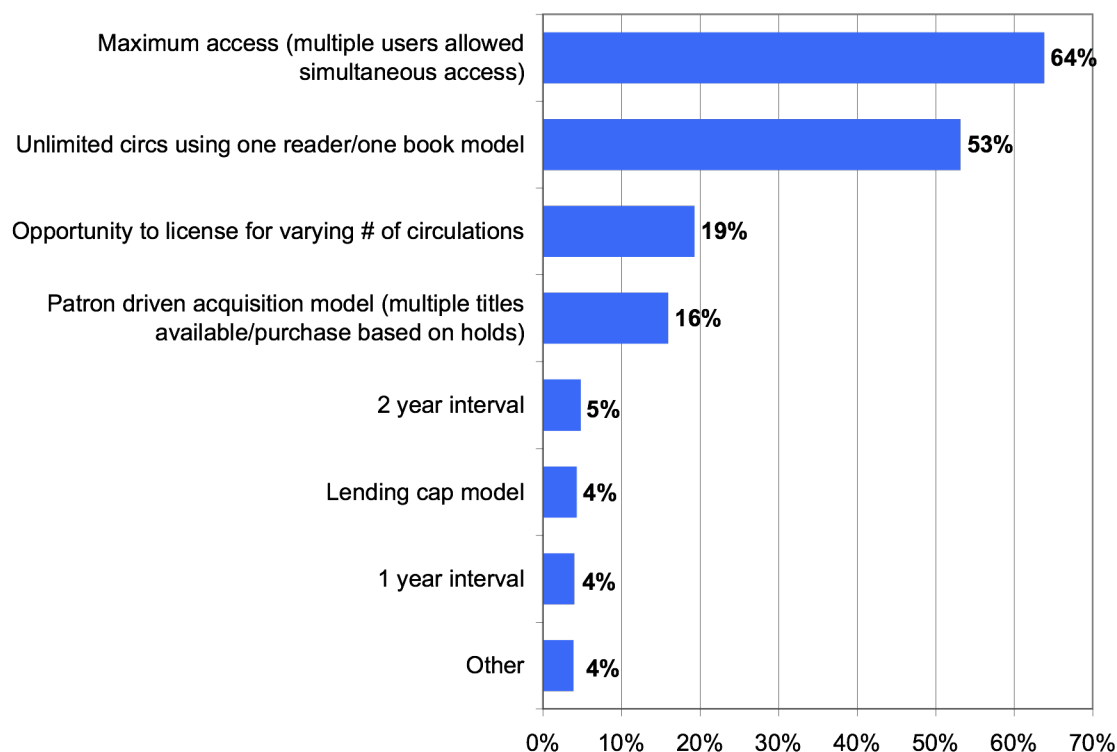
Table 20. Q35: What type of purchasing terms does your library typically use when acquiring ebooks? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Purchase with perpetual access	63%	60%	65%	64%	61%	54%	67%	61%	66%
Subscription	20%	15%	21%	18%	42%	11%	15%	24%	32%
Concurrent seat access	9%	8%	29%	16%	18%	15%	16%	19%	34%
Purchase with perpetual access through self hosting	12%	12%	18%	14%	13%	13%	5%	21%	14%
Bundled with other content	12%	5%	15%	11%	18%	11%	9%	14%	17%
Upfront purchase with maintenance fee	1%	12%	21%	8%	18%	5%	8%	16%	22%
User-driven acquisition	3%	4%	7%	4%	13%	2%	3%	6%	12%
License with a set # of circs model	3%	3%	2%	3%	5%	5%	5%	2%	3%
Upfront purchase with update fee	1%	1%	4%	2%	11%	0%	2%	4%	7%
Pay-per-use	0%	1%	0%	0%	0%	0%	0%	1%	0%
Other	3%	1%	4%	3%	5%	8%	1%	2%	4%
2010									
Purchase with perpetual access	57%	57%	57%	55%	60%	56%	56%	53%	59%
Subscription	35%	20%	30%	28%	40%	13%	21%	32%	47%
Bundled with other content	20%	18%	20%	17%	23%	10%	13%	18%	26%
Purchase with perpetual access through self hosting	15%	15%	15%	15%	15%	18%	16%	15%	12%
Upfront purchase with maintenance fee	6%	20%	24%	17%	34%	10%	11%	16%	38%
Upfront purchase with update fee	6%	11%	9%	7%	13%	3%	5%	12%	9%
User-driven acquisition	6%	3%	4%	2%	6%	5%	0%	4%	3%
Pay-per-use	4%	5%	0%	2%	2%	5%	0%	2%	3%
Concurrent seat access	0%	2%	5%	3%	2%	3%	2%	3%	5%
Lease to own	0%	3%	2%	2%	0%	0%	0%	4%	0%
Other	6%	8%	8%	9%	0%	8%	13%	4%	5%

“Fair and Realistic” Purchasing Model

Last year, we found that one of the biggest complaints that libraries of all kinds had about ebooks involved licensing models. So a question we added to the 2011 survey asked school library respondents what they felt would be a “fair and realistic” ebook licensing model. The number one response was “maximum access,” chosen by 64% of school library respondents. “Unlimited circulation using one reader/one book model” was selected by 53%. Not surprisingly, a “lending cap model” like the recent HarperCollins cap at 26 circs was not especially popular (4%).

Figure 21. Q36: What do you feel would be a fair and realistic model for licensing ebooks? —All school libraries



The responses to this question were pretty consistent across all three school types, although middle schools were less likely to prefer a “maximum access” model and more likely to prefer an “unlimited circs.” Libraries with the most money to spend prefer “maximum access” and are also more likely than average to choose a “patron driven acquisition model.” Libraries on the low end of the budget scale are most likely to choose “unlimited circs using one reader/one book model.”

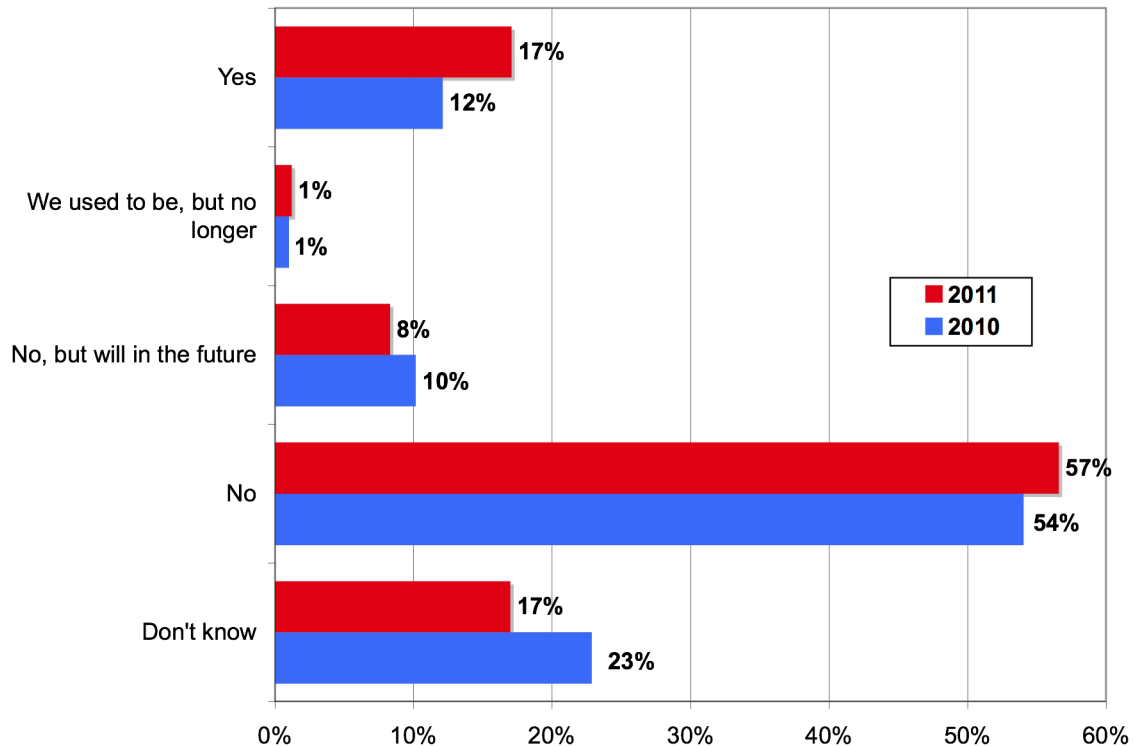
Table 21. Q36: What do you feel would be a fair and realistic model for licensing ebooks? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Maximum access (multiple users allowed simultaneous access)	65%	48%	68%	62%	79%	44%	65%	62%	80%
Unlimited circs using one reader/one book model	55%	59%	48%	54%	38%	57%	48%	55%	45%
Opportunity to license for varying # of circulations	18%	22%	19%	19%	24%	14%	20%	22%	22%
Patron driven acquisition model (multiple titles available/purchase based on holds)	14%	14%	18%	15%	29%	11%	14%	17%	28%
2 year interval	5%	2%	5%	5%	5%	7%	3%	4%	5%
Lending cap model	4%	6%	4%	4%	2%	4%	6%	3%	5%
1 year interval	5%	0%	4%	4%	2%	7%	1%	2%	4%
Other	4%	1%	4%	4%	5%	1%	3%	3%	9%

Consortium Program

Unlike public or academic libraries, school libraries are not likely to be part of a buying consortium, although membership is increasing (17% are current consortium members, up from 12% last year)..

Figure 22. Q27: Is your library part of a consortium license program for its ebook collection? —All school libraries



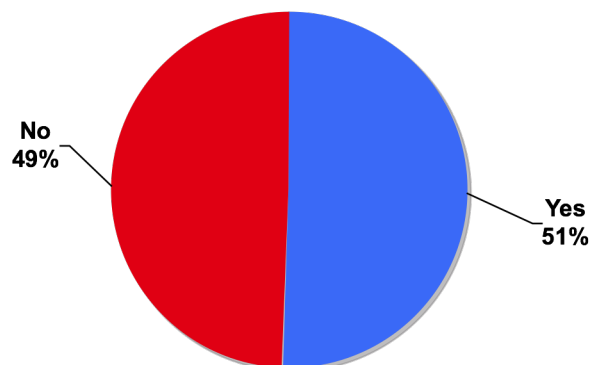
Elementary schools appear to be behind the increase in consortium membership over the last year (elementary membership increased from 7% last year to 17% this year)

Table 22. Q28: Is your library part of a consortium license program for its ebook collection? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Yes	17%	13%	19%	17%	22%	11%	23%	17%	18%
We used to be, but no longer	1%	2%	0%	1%	0%	1%	2%	0%	1%
No, but will in the future	8%	7%	10%	8%	9%	4%	10%	10%	9%
No	53%	66%	59%	56%	60%	59%	50%	64%	64%
Don't know	21%	13%	12%	18%	9%	24%	15%	10%	8%
2010									
Yes	7%	22%	17%	15%	21%	13%	13%	17%	18%
We used to be, but no longer	0%	0%	3%	1%	2%	3%	0%	1%	3%
No, but will in the future	13%	9%	6%	7%	15%	13%	6%	11%	5%
No	56%	54%	54%	54%	60%	51%	59%	54%	56%
Don't know	24%	15%	20%	23%	2%	21%	22%	17%	18%

A question we added to our 2011 survey asked if those libraries that are part of a consortium also purchase ebooks independently. Half of the respondents (51%) say they do purchase ebooks independently of the consortium.

Figure 23. Q28: If yes, does your library also buy ebooks independently? —School libraries that are part of a consortium program

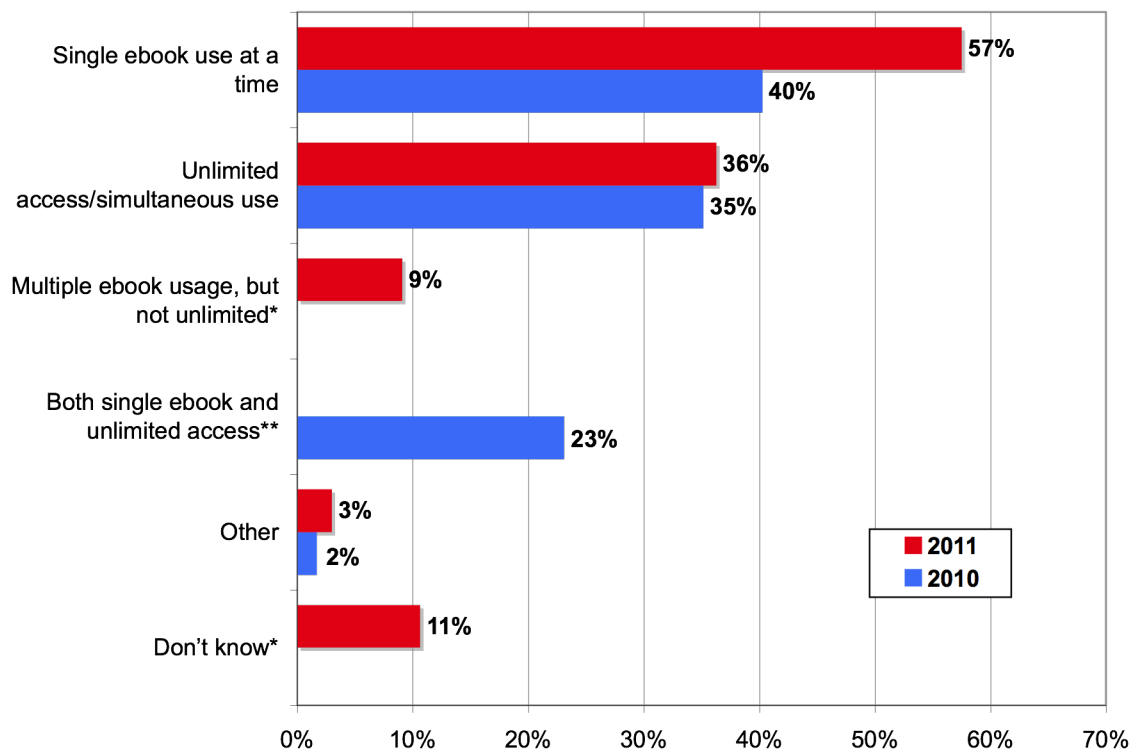


The response base to this question was too small to make any meaningful cross-tabulations by type of school or materials budget.

Ebook Usage License

In terms of usage licensing (which is often dictated by the publisher), 57% of school libraries say they license the use of only a single ebook at a time, much like a printed book model (up from 40% last year), while 36% allow unlimited access or simultaneous use of an ebook title (relatively unchanged from 35% last year). We added “multiple ebook usage but not unlimited” to the 2011 survey and it was selected by 9% of respondents.

Figure 24. Q10: What ebook usage license model is currently employed at your library? —All school libraries



*Added to 2011 survey.

**Included on 2010 survey only.

High schools are far and away the most likely to employ “unlimited access/simultaneous access” (58%, up from 51%) even as this model is becoming less popular among middle schools (26%, down from 43%).

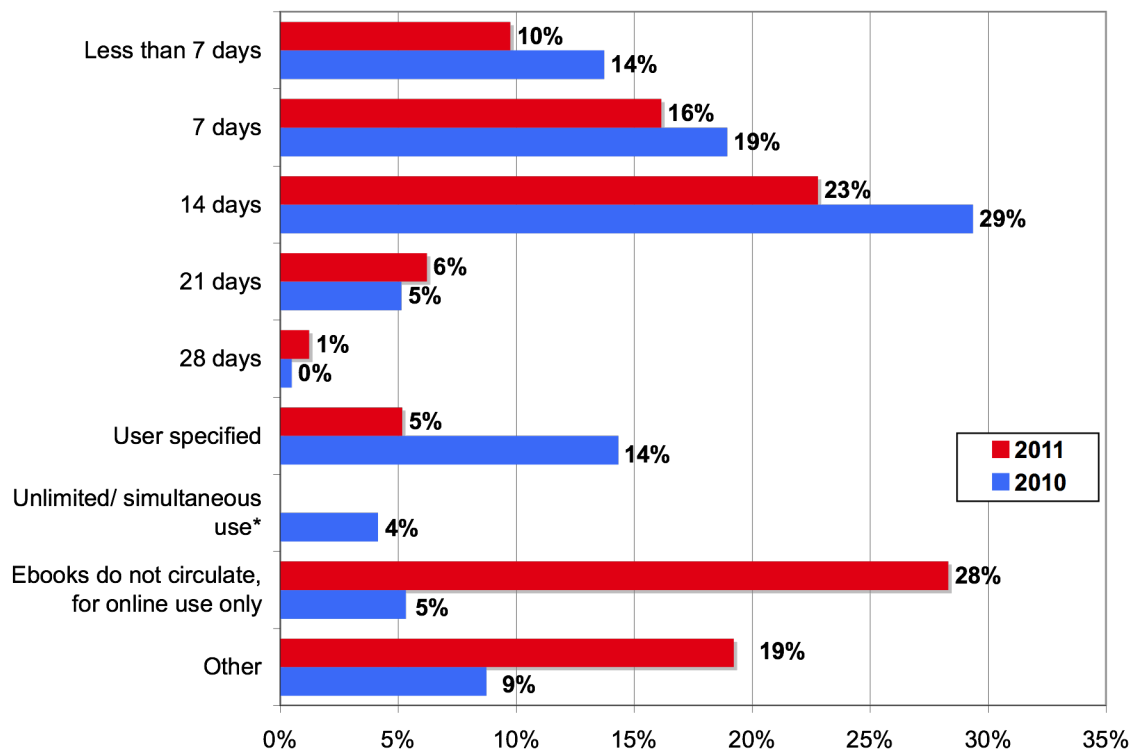
Table 23. Q10: What ebook usage license model is currently employed at your library? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Single ebook use at a time	60%	63%	53%	59%	35%	52%	58%	56%	53%
Multiple ebook usage, but not unlimited	5%	14%	10%	9%	13%	5%	14%	11%	17%
Unlimited access/simultaneous use	28%	26%	58%	34%	59%	26%	33%	44%	65%
Other	1%	2%	5%	2%	11%	4%	6%	3%	6%
Don't know	14%	10%	6%	11%	2%	18%	5%	8%	3%
2010									
Single e-book use at a time	53%	36%	22%	35%	18%	44%	40%	29%	20%
Unlimited access/simultaneous use	26%	43%	51%	41%	55%	36%	33%	51%	46%
Both	19%	20%	26%	23%	27%	20%	23%	20%	32%
Other	2%	1%	1%	2%	0%	0%	4%	0%	1%

Circulation Interval

The biggest trend we are seeing with regard to ebook circulation intervals in school libraries is that ebooks increasingly don't circulate—this rose from 5% last year to 28% in the current survey. All other intervals are declining. “Other” rose from 9% to 19%, suggesting that libraries are experimenting with approaches to loaning or providing access to ebooks that differs from a traditional print book circulation model.

Figure 25. Q11: What is the circulation interval for ebooks at your library? —All school libraries



*Included on 2010 survey only.

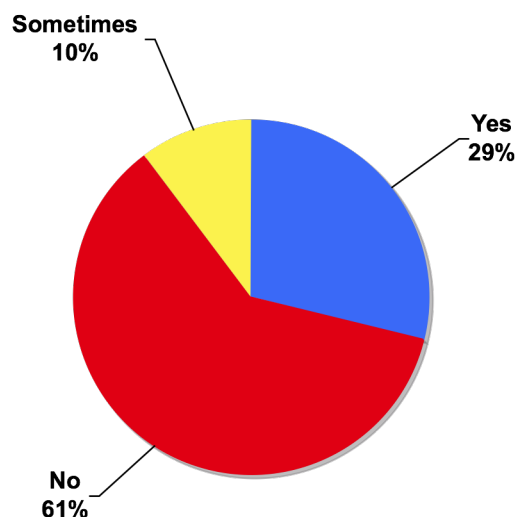
Table 24. Q11: What is the circulation interval for ebooks at your library? — School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Ebooks do not circulate, for online use only	30%	32%	26%	28%	35%	33%	27%	25%	27%
Less than 7 days	13%	7%	4%	9%	10%	3%	9%	8%	9%
7 days	21%	9%	11%	17%	8%	11%	15%	11%	15%
14 days	15%	37%	27%	22%	23%	31%	23%	25%	33%
21 days	2%	10%	13%	6%	8%	4%	9%	11%	9%
28 days	1%	1%	1%	1%	2%	0%	1%	2%	1%
User specified	4%	1%	8%	5%	6%	5%	6%	5%	8%
Other	19%	11%	25%	19%	17%	18%	17%	20%	23%
2010									
Less than 7 days	17%	15%	13%	13%	17%	16%	10%	12%	16%
7 days	22%	13%	10%	16%	6%	14%	22%	13%	8%
14 days	28%	40%	27%	30%	25%	40%	28%	27%	27%
21 days	3%	6%	6%	4%	13%	5%	10%	3%	5%
28 days	0%	0%	1%	1%	0%	0%	1%	1%	0%
User specified	13%	7%	14%	14%	19%	9%	12%	18%	16%
Non-circulating	3%	9%	9%	8%	2%	5%	4%	11%	5%
Unlimited/simultaneous use	2%	7%	10%	6%	8%	7%	4%	5%	10%
Other	12%	1%	10%	8%	10%	5%	6%	9%	11%

User Holds on Ebooks

A question we added to the 2011 survey asked if school library media centers allowed students or faculty to place holds on ebook titles and in general the answer is “no” (61%). Fewer than a third (29%) allow students/faculty to place holds on ebooks, likely for very popular titles or perhaps required reading for classes.

Figure 26. Q12: Do you allow students/faculty to place holds on downloadable ebooks? —All school libraries



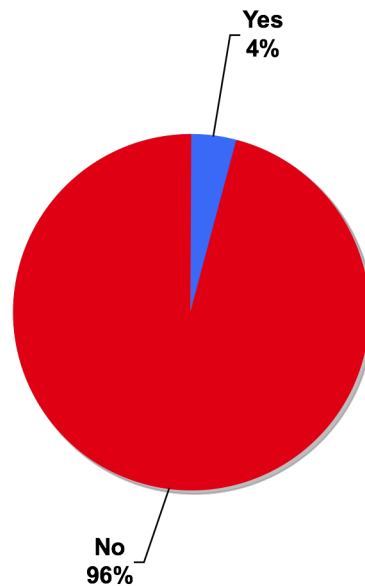
Elementary school libraries (especially in public schools) are the most likely to allow library users to place holds on ebook titles.

Table 25. Q12: Do you allow students/faculty to place holds on downloadable ebooks? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes	31%	27%	23%	30%	16%	35%	27%	25%	26%
No	59%	61%	68%	61%	73%	54%	63%	62%	68%
Sometimes	10%	13%	9%	9%	12%	11%	11%	13%	6%

A follow-up question asked if those libraries that do allow user holds on ebook titles ever purchased additional digital copies to fulfill user holds. And the answer was a resounding “no”: 96% have not purchased additional copies.

Figure 27. Q13: If yes, Have you ever purchased an extra digital copy to fulfill ebook holds? —School libraries that allow user holds on ebook titles



High schools and libraries with the highest materials budgets are the most likely to buy extra copies, but they only amount to 10% of respondents.

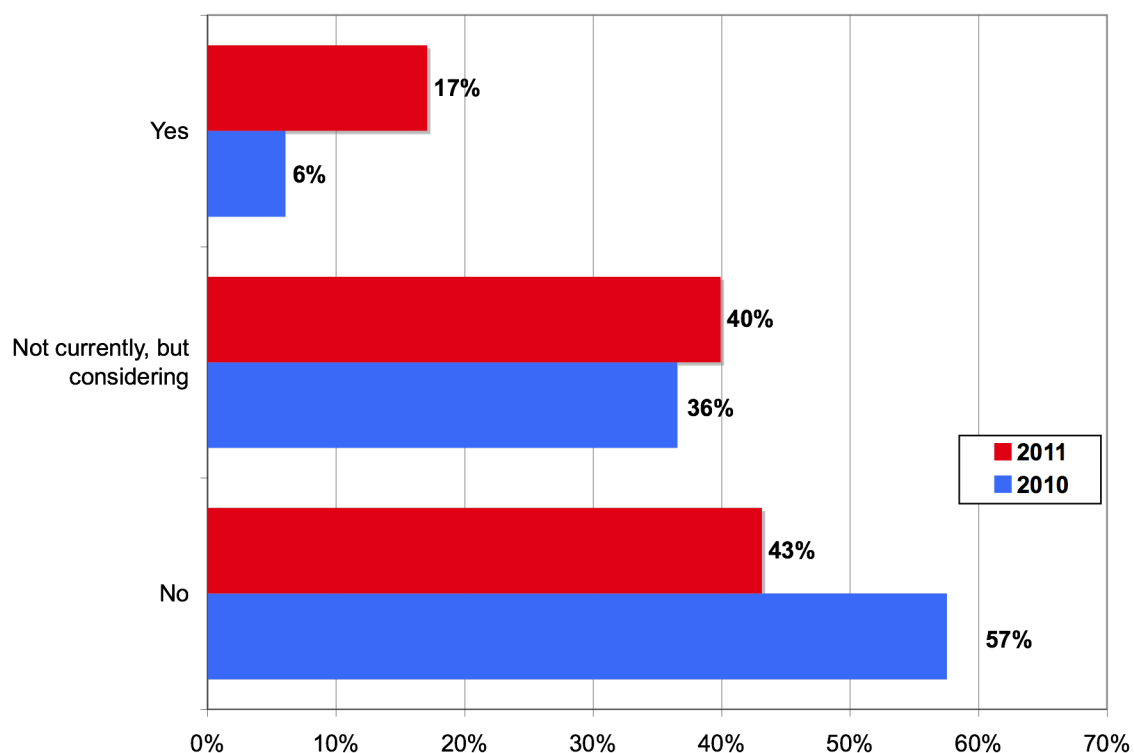
Table 26. Q13: If yes, Have you ever purchased an extra digital copy to fulfill ebook holds? —School libraries that allow user holds on ebook titles, by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes	3%	0%	10%	4%	0%	3%	5%	5%	10%
No	97%	100%	90%	96%	100%	97%	95%	95%	90%

Hardware Circulation

Fewer than 1-in-5 school libraries circulates actual preloaded e-reading devices, although that number is growing: 17% said they circulate preloaded reading devices (up from 6% last year), and a further 40% don't currently, but are considering it (up from 36%). In 2011, we also asked if the devices were for in-library use only or if they could be taken home: 6% said "for in-library use only" and 11% said "for take home use." Libraries would like to circulate but with the age groups served by these libraries, loss and damage of the devices are substantial risks. Some libraries have parents sign consent or liability forms to replace lost or damaged ereaders.

**Figure 28. Q19: Does your library circulate preloaded ereading devices?
—All school libraries**



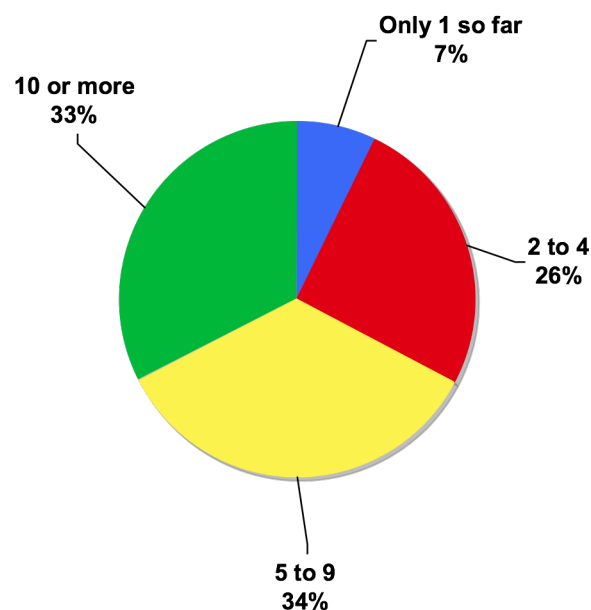
Private schools and schools with the largest materials budgets are most likely to currently circulate ereading devices.

Table 27. Q19: Does your library circulate preloaded ereading devices? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
NET YES	11%	20%	22%	17%	28%	13%	18%	22%	35%
Yes, for in-library use only	7%	7%	2%	6%	4%	4%	6%	5%	11%
Yes, for take home use	5%	13%	20%	10%	23%	9%	12%	17%	24%
Not currently, but considering	39%	46%	37%	40%	34%	35%	42%	46%	31%
No	49%	34%	41%	44%	38%	53%	40%	32%	35%
2010									
Yes	5%	9%	3%	5%	8%	2%	4%	4%	11%
Not currently, but considering	38%	41%	37%	38%	34%	26%	45%	35%	40%
No	57%	51%	60%	57%	58%	72%	51%	61%	49%

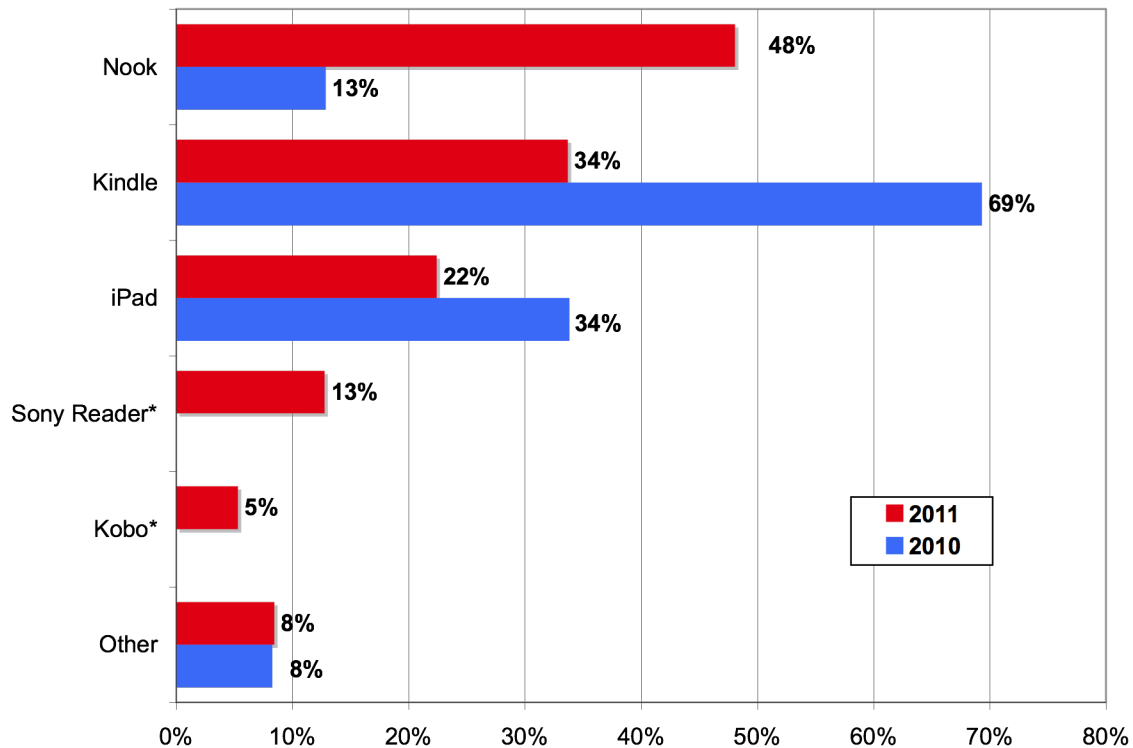
In 2011, we asked those who do circulate ereading devices (17% of all school libraries), how many devices they maintain for the purpose. The mean number of devices was 11 (median 6). A third of respondents circulate ten or more.

Figure 29. Q20: If yes, how many preloaded ereading devices does your library maintain? —School libraries that circulate preloaded ereading devices



Of the 17% of school libraries that do circulate the actual hardware devices, the Barnes & Noble Nook has pulled ahead dramatically: it was selected by 48% of respondents, up from 13% last year. The popularity of Amazon's Kindle dropped by half (from 69% to 34%) as the preferred device, while the Apple iPad, too, declined in popularity (34% to 22%) as a circulating ereader in school library media centers.

Figure 30. Q21: If yes, which preloaded ereading device(s) does your library circulate? —School libraries circulating ereading devices (multiple responses permitted)



*Added in 2011 survey.

The responses to Questions 20 and 21 were only based on 17% of all school libraries, so the data are too thin to cross-tabulate in any meaningful or projectable way.

Ebook Circulation Trends

The ebook circulation figures in the two tables below are based on respondent data from the 2011 survey alone.

Ebook Circulation—2009–2010 School Year

Only two years ago, in the 2009–2010 school year, 74% of school libraries said their ebook circulation was zero, and 21% said that their circulation was less than 250. The mean ebook circulation in the 2009–2010 school year was 193.

Figure 31. Q14: What was your ebook circulation in the 2009–2010 school year? —All school libraries

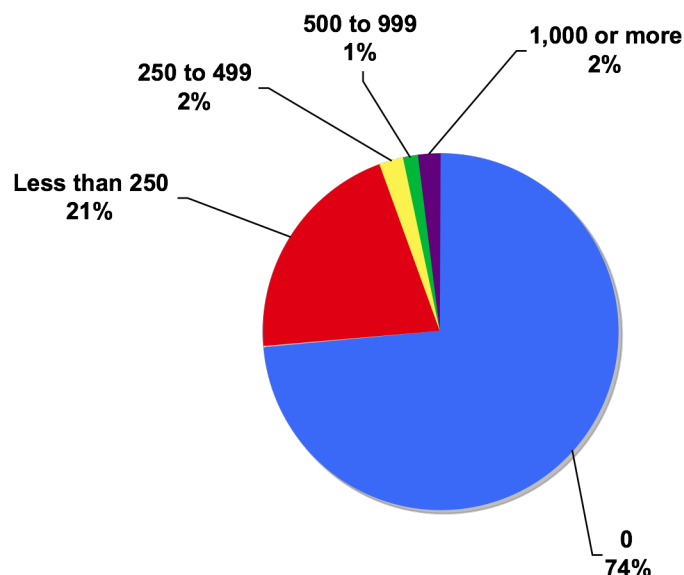


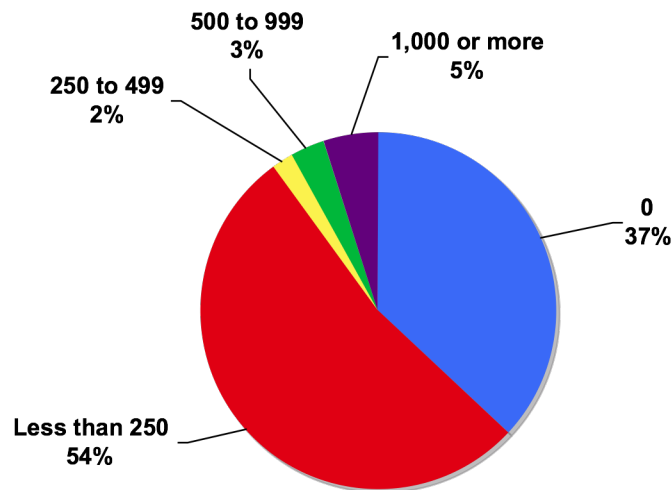
Table 28. Q14: What was your ebook circulation in the 2009–2010 school year? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
0	77%	75%	64%	74%	69%	81%	81%	65%	54%
Less than 250	19%	23%	32%	21%	19%	17%	17%	29%	30%
250 to 499	1%	1%	1%	1%	8%	0%	1%	3%	2%
500 to 999	1%	0%	0%	1%	4%	0%	0%	1%	7%
1,000 or more	1%	1%	3%	2%	0%	2%	1%	3%	7%
Mean	190	235	106	202	55	29	159	299	256
Median	0	0	0	0	0	0	0	0	0

Ebook Circulation—2010–2011 School Year

A year later, in the 2010–2011 school year, 37% of school libraries said their ebook circulation was zero (some libraries do not circulate their ebooks). This is exactly half of the number who had a circulation of zero a year before. The majority (54%) of school libraries reported that their ebook circulation in the 2010–2011 school year was less than 250 and 9% had circulations over 500. The mean ebook circulation in FY 2010 was 313.

Figure 32. Q14: What was your ebook circulation in the 2010–2011 school year? —All public libraries



Comparing the ebook circulation of the 2009-2010 and 2010-2011 school years, circulation rose 71% in high school libraries, 59% among elementary schools and 14% in middle school libraries.

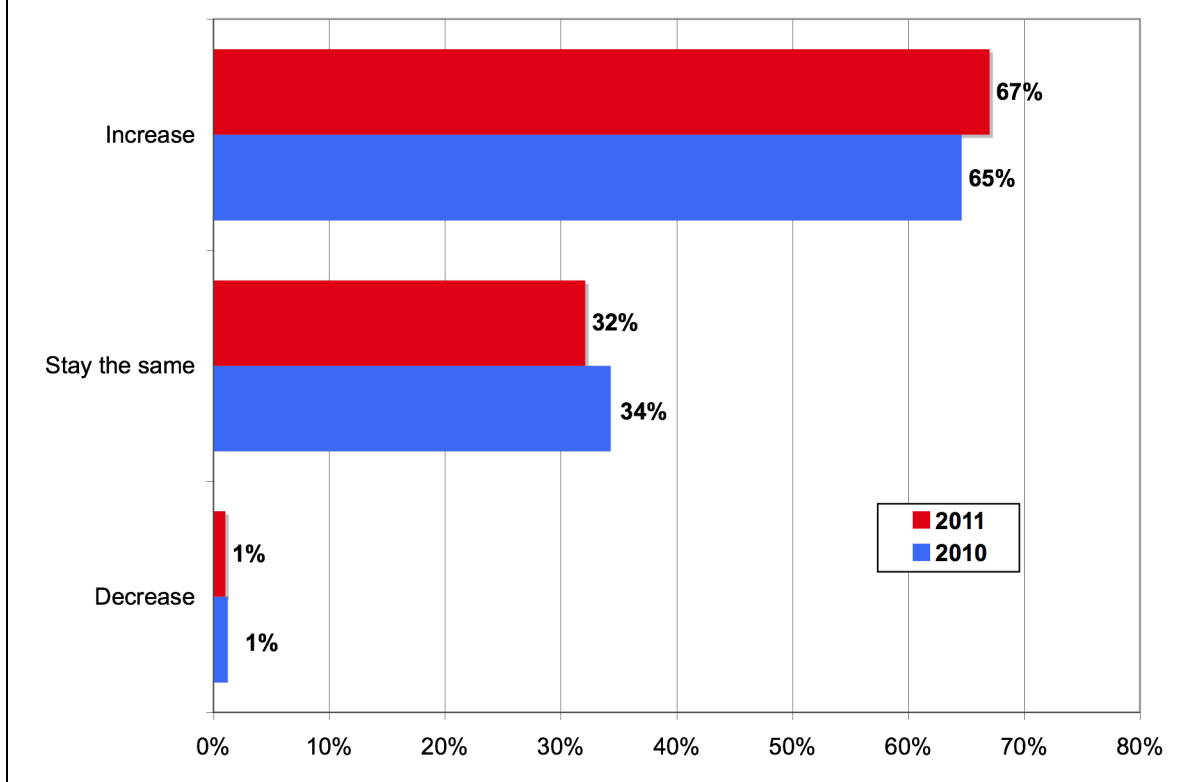
Table 29. Q14: What was your ebook circulation in the 2010–2011 school year? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
0	36%	38%	40%	37%	35%	52%	31%	37%	28%
Less than 250	56%	56%	52%	54%	50%	45%	61%	52%	49%
250 to 499	1%	1%	3%	1%	12%	0%	1%	2%	7%
500 to 999	3%	3%	1%	3%	4%	0%	3%	4%	5%
1,000 or more	4%	1%	4%	5%	0%	3%	4%	6%	12%
Mean	303	267	181	324	103	121	354	362	526
Median	8	5	6	6	31	0	10	7	25

Ebook Circulation Increasing/Decreasing

Two-thirds (67%) of survey respondents expect ebook circulation to increase next year compared to this school year, which is comparable to the number expecting an increase last year. The overall percent increase in circulation expected in the 2011-2012 school year is 43% (last year school librarians predicted a 26% increase).

Figure 33. Q15: Compared to this school year, do you expect next year's circulation of ebook titles to increase, stay the same or decrease? —All school libraries



We also asked our respondents to estimate how much of an increase or decrease they expected:

	2010	2011
Average % increase	42%	64%
Average % decrease	100%	44%
Overall % change in ebook circ expected for the following school year:	+26%	+43%

School libraries in general expect ebook circulation to increase, although middle schools are still a bit ahead of the curve, with those schools expecting an overall 54% increase in ebook circulation next year, up from 41% last year.

Table 30. Q15: Compared to this school year, do you expect next year's circulation of ebook titles to increase, stay the same or decrease?

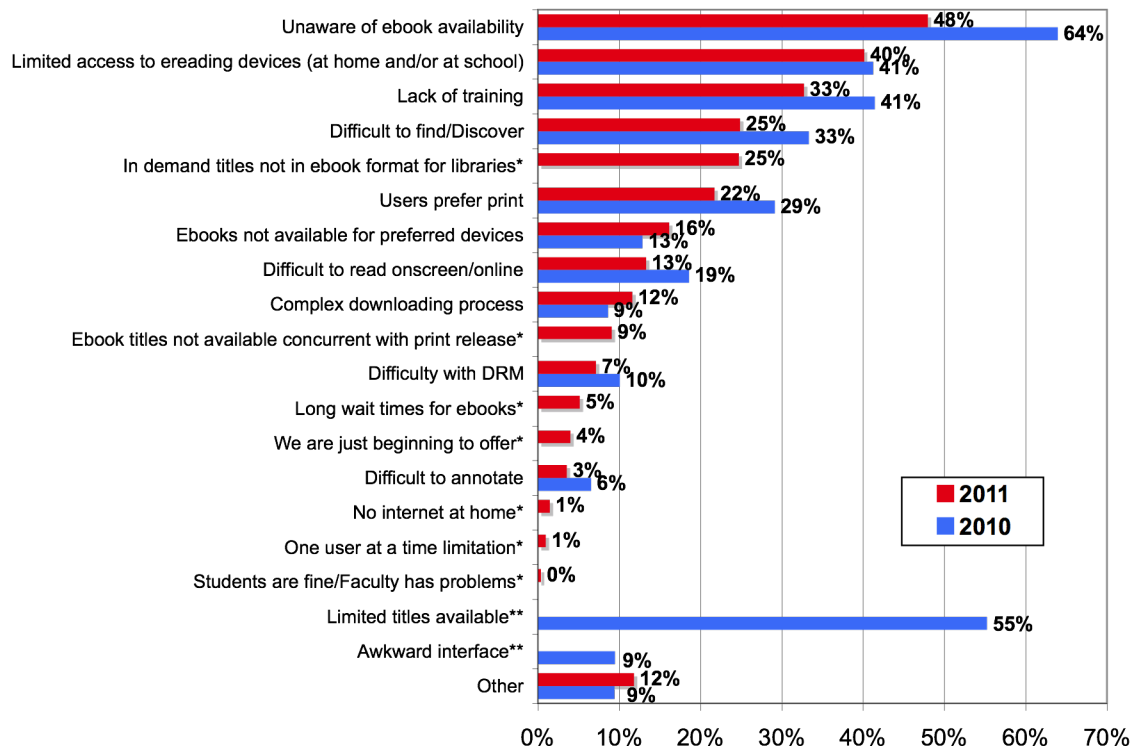
—School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Increase	64%	71%	67%	66%	77%	62%	71%	70%	76%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%	100%
Less than 10%	10%	12%	15%	12%	7%	18%	11%	10%	16%
10% to 24%	25%	26%	33%	26%	52%	26%	30%	29%	40%
25% to 49%	10%	18%	12%	11%	15%	5%	11%	19%	8%
50% to 74%	13%	10%	14%	14%	7%	18%	14%	11%	12%
75% to 99%	2%	0%	4%	2%	4%	0%	0%	3%	2%
100% or more	42%	34%	22%	37%	15%	33%	38%	28%	22%
Average % increase	69%	76%	53%	67%	37%	76%	61%	60%	45%
Stay the same	35%	29%	32%	32%	23%	38%	27%	29%	24%
Decrease	1%	0%	1%	1%	0%	0%	2%	1%	0%
Average % decrease	50%	0%	0%	44%	0%	0%	32%	0%	0%
Overall Percent Change Expected	+43%	+54%	+36%	+44%	+28%	+47%	+43%	+42%	+34%
2010									
Increase	63%	69%	69%	66%	69%	51%	66%	61%	82%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%	100%
Less than 10%	8%	8%	10%	12%	3%	14%	9%	10%	10%
10% to 24%	37%	50%	54%	48%	47%	32%	58%	55%	40%
25% to 49%	18%	10%	11%	15%	19%	18%	7%	18%	19%
50% to 74%	18%	10%	13%	12%	9%	27%	12%	10%	7%
75% to 99%	8%	6%	3%	3%	3%	9%	2%	0%	7%
100% or more	11%	15%	9%	9%	19%	0%	12%	8%	17%
Average % increase	42%	60%	39%	39%	44%	30%	36%	40%	46%
Stay the same	35%	31%	31%	34%	31%	49%	32%	38%	18%
Decrease	2%	0%	1%	1%	0%	0%	1%	1%	0%
Average % decrease	100%	0%	100%	100%	0%	0%	100%	100%	0%
Overall Percent Change Expected	+25%	+41%	+26%	+25%	+31%	+16%	+22%	+23%	+38%

Barriers to Ebook Consumption

The top barrier to ebook consumption by school library users is still “unaware of ebook availability,” selected by 48% of school library respondents, although this is down substantially from 64% last year. In fact, all barriers are down from last year except for “ebooks not available for preferred devices” (16%) and “complex downloading process” (12%).

Figure 34. Q23: What hinders the public from reading your media center's ebook content? —All school libraries (multiple responses permitted)



*Added to 2011 survey.

**Included in 2010 survey only.

Table 31. Q23: What hinders the public from reading your media center's ebook content? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Unaware of ebook availability	44%	42%	62%	49%	48%	45%	48%	47%	67%
Limited access to ereading devices (at home and/or school)	36%	48%	42%	41%	34%	47%	43%	39%	45%
Lack of training	33%	29%	31%	33%	25%	26%	34%	34%	37%
Difficult to find/Discover	22%	27%	32%	24%	39%	16%	24%	32%	33%
In demand titles not in ebook format for libraries	24%	32%	23%	26%	20%	28%	29%	24%	19%
Users prefer print	18%	19%	30%	22%	16%	20%	20%	24%	36%
Ebooks not available for preferred devices	14%	25%	16%	16%	20%	16%	19%	16%	23%
Difficult to read onscreen/online	13%	20%	11%	13%	18%	12%	13%	13%	18%
Complex downloading process	13%	9%	11%	11%	9%	8%	11%	12%	10%
Ebook titles not available concurrent with print release	9%	7%	9%	9%	9%	7%	10%	8%	12%
Difficulty with DRM	3%	14%	9%	7%	11%	5%	10%	9%	15%
Long wait times for ebooks	3%	11%	7%	5%	0%	8%	6%	6%	4%
We are just beginning to offer	5%	4%	3%	3%	7%	3%	4%	5%	1%
Difficult to annotate	2%	2%	6%	3%	20%	3%	3%	4%	10%
No internet at home	2%	0%	0%	1%	0%	1%	1%	1%	0%
One user at a time limitation	1%	0%	1%	1%	0%	0%	0%	1%	1%
Students are fine/Faculty has problems	0%	1%	0%	0%	0%	0%	0%	0%	1%
Other	11%	13%	13%	11%	14%	12%	12%	11%	14%
2010									
Unaware of ebook availability	66%	69%	62%	61%	83%	53%	68%	64%	69%
Limited titles available	66%	47%	43%	50%	40%	53%	58%	49%	32%
Lack of training	41%	32%	45%	40%	46%	28%	41%	46%	41%
Limited access to ereading devices	45%	32%	32%	39%	19%	35%	36%	38%	35%
Difficult to find/Discover	29%	32%	42%	37%	33%	23%	39%	34%	46%
Users prefer print	28%	28%	31%	29%	21%	35%	33%	28%	18%
Difficult to read onscreen/online	17%	21%	21%	21%	17%	12%	23%	22%	19%
Not available for preferred devices	14%	15%	11%	15%	8%	14%	15%	13%	12%
Difficulty with DRM	9%	9%	13%	13%	13%	7%	8%	13%	21%

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Awkward interface	9%	9%	16%	11%	15%	9%	11%	10%	16%
Complex downloading process	9%	6%	6%	7%	10%	7%	5%	8%	10%
Difficult to annotate	2%	13%	12%	7%	29%	14%	8%	10%	13%
Other	7%	7%	11%	12%	4%	14%	12%	7%	9%

Technical Problems

Respondents that reported users “never” have technical problems downloading ebooks rose from 36% last year to 51%.

Figure 35. Q25: How often do your users report technical problems when downloading an ebook? —All school libraries

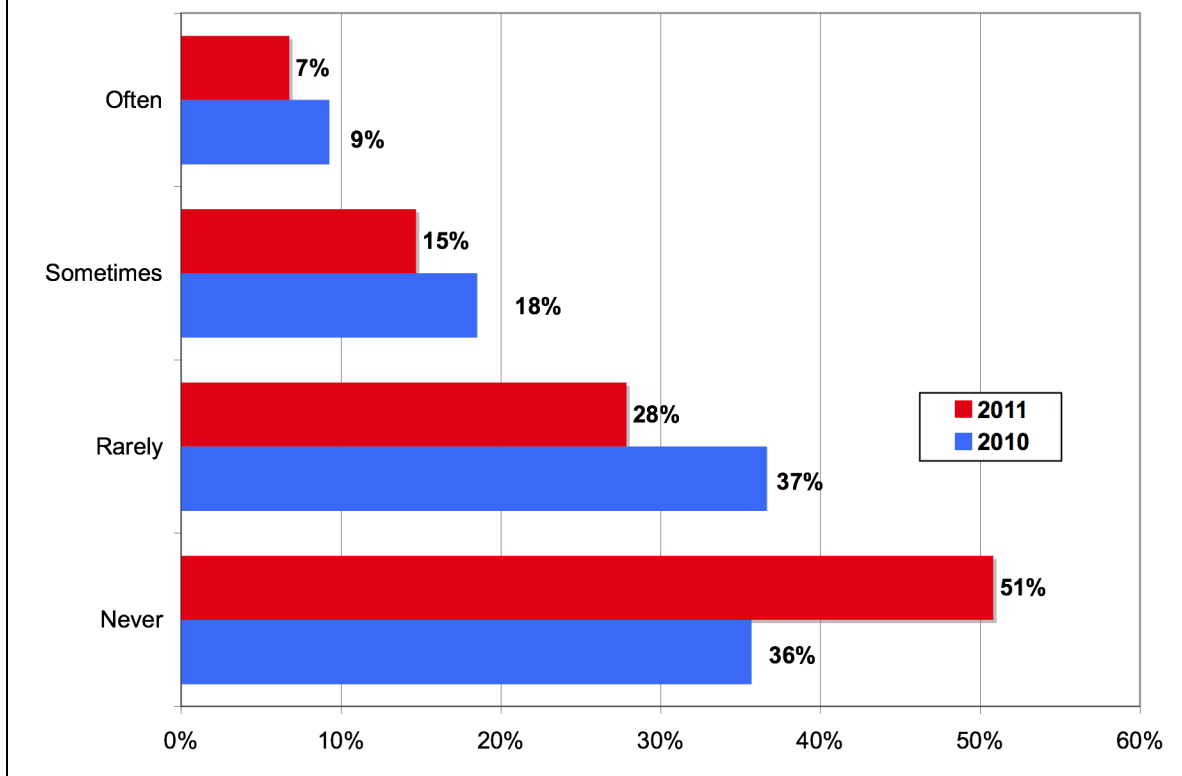


Table 32. Q25: How often do your users report technical problems when downloading an ebook? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Often	8%	4%	4%	6%	5%	3%	5%	6%	6%
Sometimes	13%	17%	13%	15%	18%	15%	15%	15%	18%
Rarely	23%	36%	34%	27%	35%	24%	35%	30%	39%
Never	55%	43%	49%	52%	43%	58%	45%	49%	38%
2010									
Often	14%	3%	4%	7%	0%	14%	5%	5%	4%
Sometimes	18%	18%	20%	21%	17%	29%	18%	15%	22%
Rarely	32%	42%	41%	39%	42%	24%	45%	45%	35%
Never	37%	37%	36%	33%	42%	33%	32%	35%	38%

General Conclusions

The decision by libraries to add ebooks to their collections is predominantly driven by the expectation of future demand, as well as by some current demand. Demand from K–12 students for ebooks is greater in the higher grades—especially middle schools—but is still not as robust as in other types of libraries.

But looking at circulation changes, it's clear there is strong movement. Mean circulation is up from ~200 last year to ~300 this year, and the number of libraries that don't circulate any ebooks is drastically reduced from last year. The big challenge, as the data and the verbatim responses presented below show, is that users are not always (or often) able to download ebooks to their preferred ereading devices, having to rely on the library computer. This is hampering further ebook growth.

Many libraries are still frustrated by usage license models, and simply find print editions to be far easier to buy and loan. Budget constraints also hamper many school libraries and media centers from investing in ebooks as much as they would like to.

In Their Own Words...

Here, we continue the “verbatim” comments from the end of Chapter 2 that comprise our survey respondents qualitatively expressing (or venting) their opinions of ebooks, how they have impacted their libraries/media centers, and what some of their problems with publishers and vendors have been.

- We are looking to experiment with other vendors than Follett, but are finding that navigating the district and vendor bureaucracy can be complicated beyond belief.
- My students seem to feel that they would still like to have print material over the use of an ebook format.

- There are 2 distinct types of ebooks: REFERENCE that is available through the web; CIRCULATING (fiction, non-fiction that should be downloadable—we cannot purchase these for download to devices with a p.o. from Barnes & Noble, Amazon, Follett or anyone else... frustrating!!
- Currently using subscription service which is unlimited and multi-user and economical and provides picture books. Looking into juvenile fiction for 3-6 grades on a circulating device such as kindle-preferably a device that is single function such as e-reader only, not a small computer.
- Many students do not have access to ebook readers and/or internet. Also, our district is very strict and blocks many websites and programs, and does not provide wi-fi access. Therefore, we rely more on print versions and recommend that students who do wish to read ebooks do so through the public library.
- Reading an ebook should be as easy as taking a book from the shelf and reading it.
- There is one vendor who requires we purchase the print books in order to have access to the e-books. This is an untenable situation as we cannot afford the space for the books we'd like to have from this vendor. Thus, we are purchasing neither the print nor electronic books from them. Easy access to statistics is a big boon.
- I would like to have Follett really make ebooks easily available without required proprietary hardware.
- My students are too poor to have eReaders of any type. They can barely afford computers, and often don't have new computers with the capacity to read ebooks. The digital divide is alive and well, and I worry that ebooks, coupled with closing libraries, will shut kids out from reading of any kind.
- We were excited about getting our first Kindles but the Amazon policy of using credit cards to purchase e-books has caused us not to purchase items. It is against our school district's policy to use the corporation credit card for on-line purchases.
- The prices are more expensive than paperback books. I am having a hard time buying a lot of them.
- We look forward to changes and improvements in ebooks for schools. Because close to 20% of our students do not have internet access in their home or ereader devices, we will continue to purchase print items. For ebooks—we prefer the multi-user model.
- Our ebooks are essential for reference materials and are part of our Gale Virtual Reference Library. Students don't think of them as books, but as information sources. We would love to have ebook circulation access for fiction, but just are not there yet. We would collaborate with our public library to offer ebooks for popular reading.

- I have questioned students about their preference to print or ebooks. One student said he didn't want to read, so he didn't care. But the majority asked for print. Until we can download books to personal devices, I'm not sure I would spend too much money on ebooks.
- Wish they were easier to promote. Have vendors ever thought about making a dummy ebook cover to put on a shelf so that an ebook can be browsed?
- I think ebooks popularity will continue to grow, but to date demand at our school is very low to non-existent. The key will be to allow students to download to their own devices. If that is implemented in a manner that is quick and easy then demand and circulation will greatly increase. It will not take any marketing/PR at the school to make students aware of the availability of ebooks if the above happens—they will spread it themselves by word of mouth and social networks.
- Universalize formats, access, rights, make open and easy to manage.
- Our library offers a variety of ereaders devices: in-library only ereaders, eReaders for checkout, ebooks for online catalog browsing/reading which can also be downloaded...this is too hard for the average user. it is important to note the vital importance of the teacher librarian to oversee the management of all these ebook options!
- We received our ebooks free from Follett when we purchased Destiny in the fall of 2008. Our students received laptop computers in spring of 2011. The upcoming year will be the first in which our students have access to ebooks, so I will likely purchase some IF we receive any money (not likely). Only once in four years have we had money (this year \$2500, but things look most bleak for the coming year. Our district just lost all media assistants and I'm not too sure we won't be cut as well.
- I'm eager for the market to stabilize though I expect that will take another year or so. I'm eager for competition to OverDrive because their model is expensive, and you don't "own" the titles in perpetuity. I would like Gale to develop a more visual type of shelf. I'd like Follett Destiny to develop a way to display all ebooks (not their Shelf product—which operates separately from the catalog) but a way within the catalog. I don't see the demand yet from students, but our school is rolling out 1:1 iPads next year, so I foresee switching to a service like OverDrive.
- Through the NYC DOE library vendors are limited. Any ebook purchases would have to be through the approved jobbers—B&T and Follett. Publishers must be aware of this and make sure their ebooks are available through these vendors.
- I began with a grant and 4 Kindles last school year. Students read required English novels and personal choices of their own. Teachers were allowed to check out the Kindles at the end of the grant period. For the 2011-2012

school year, we will have 8 Kindles to check-out for the student population.

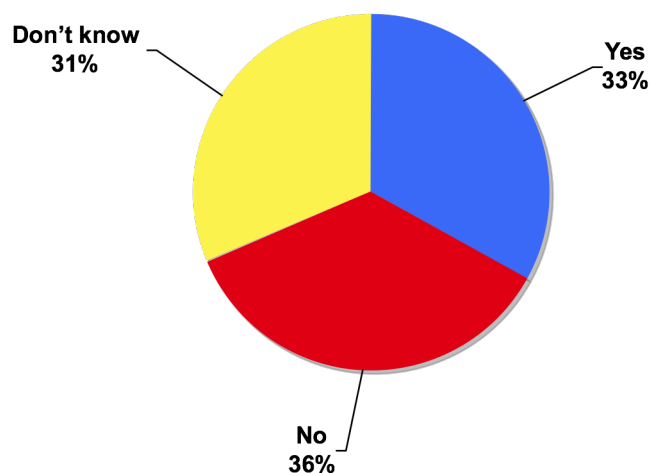
- Reference ebooks have made research MUCH easier for students with 24/7 access to content with unlimited users. We are just beginning popular and curriculum support for novels with NookColor ereaders. Kids are excited to begin using them!
- At this point in time, I would never totally convert to ebooks as students still like to curl up with a physical book.
- I feel ebooks are definitely the newest trend. This is the direction my principal wants to see my library go so I still plan on keeping a large collection of YA fiction but will focus on ebooks in the reference/nonfiction area as well as required English reading books. Adding YA fiction at a slower pace.
- I am coming home from ALA a little overwhelmed by the variety and scope of resources. Right now I feel that I may have to subscribe to multiple services to fill all our needs. I am hoping Follett, as our catalog provider and book provider and expand the scope of its ebooks to fill all our needs.

4. EBOOKS, PRINT BOOKS, AND BUDGETS

Attracting New Users to the Library

Have school libraries found that offering ebooks has attracted new users to the library, users who haven't used the library before? Yes and no—and don't know: all three received roughly one-third of responses. Unlike public libraries (which responded much more positively to this question), school libraries are harder to avoid by users, as students, especially in the lower grades, are likely to have regularly scheduled library time.

Figure 36. Q24: Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before? —All school libraries



High school libraries are the most likely to see new faces as a result of offering ebooks.

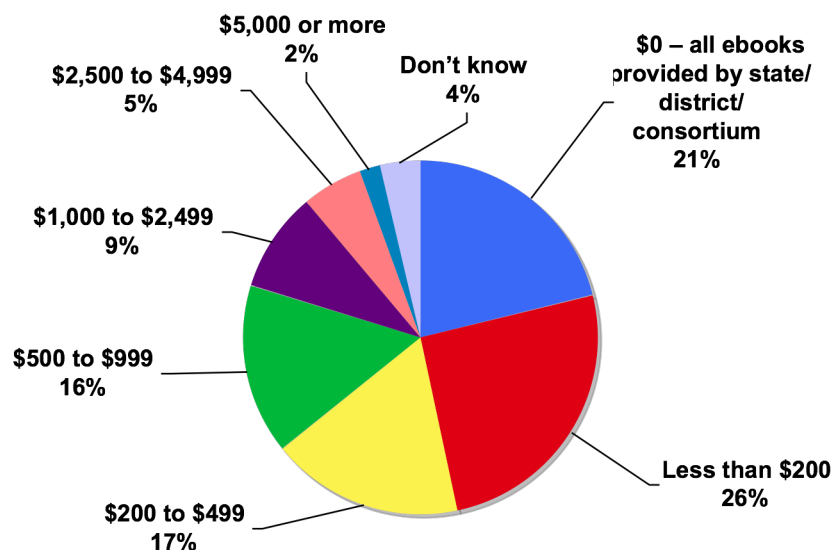
Table 33. Q24: Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
Yes	27%	34%	44%	32%	35%	20%	42%	43%	40%
No	44%	26%	22%	36%	37%	31%	25%	30%	33%
Don't know	29%	40%	34%	32%	28%	49%	33%	27%	28%

Current Spending on Ebooks

In a new question, we asked school libraries to estimate how much they spent on ebooks in the current school year (2010–2011). On average, libraries said they spent \$1,020 (median \$350) on ebooks this year.

Figure 37. Q32: Approximately how much does your library expect to spend on ebooks for the current school year (2010-2011)? —All school libraries



Elementary schools that offer ebooks spent an average of \$475 on them in 2010–2011, middle schools spent \$520 and high schools spent considerably more at \$1,181, on average. Medians might be a more accurate gauge of dollars spent, as a large disparity exists between the median and average.

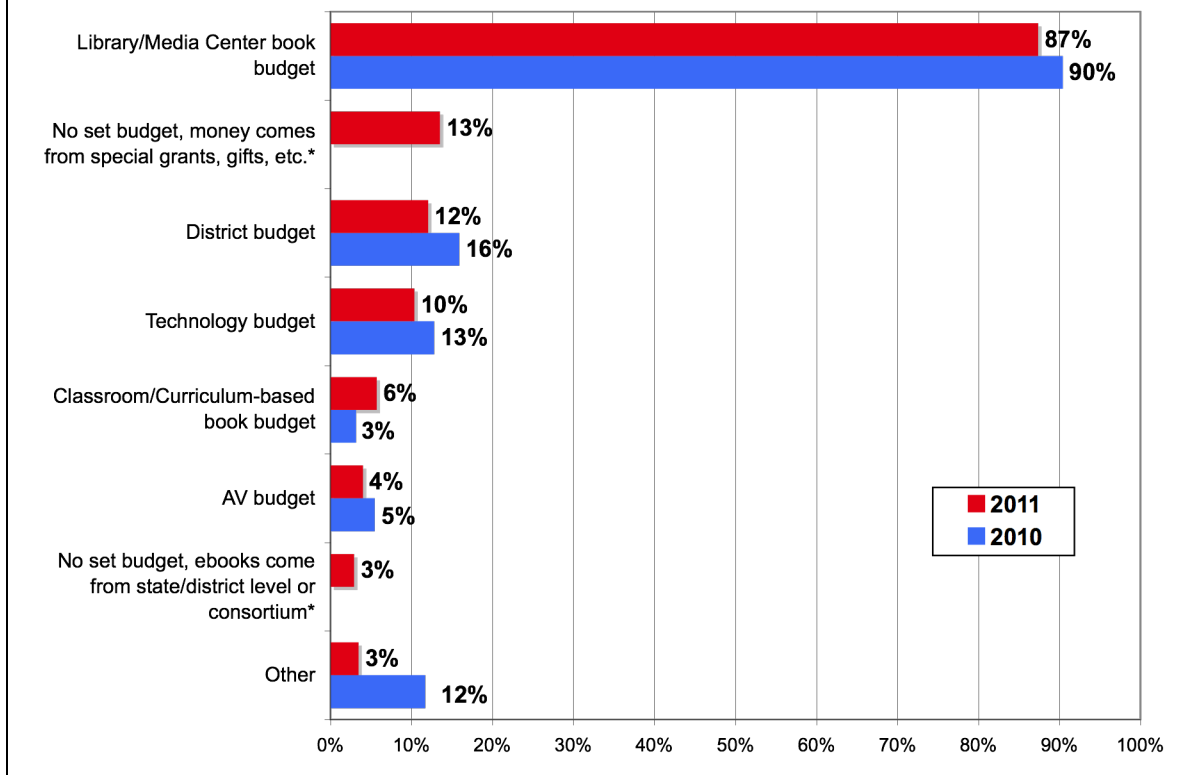
Table 34. Q32: Approximately how much does your library expect to spend on ebooks for the current school year (2010-2011)? —School libraries that offer ebooks by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
\$0 – all ebooks provided by state/district/consortium	23%	32%	15%	22%	14%	39%	24%	15%	6%
Less than \$200	28%	24%	24%	26%	19%	34%	23%	28%	8%
\$200 to \$499	20%	17%	13%	18%	16%	10%	19%	19%	13%
\$500 to \$999	18%	11%	16%	14%	12%	10%	18%	15%	13%
\$1,000 to \$2,499	5%	10%	15%	9%	19%	3%	9%	14%	22%
\$2,500 to \$4,999	4%	5%	8%	5%	14%	1%	4%	3%	19%
\$5,000 or more	0%	0%	4%	2%	7%	0%	1%	2%	14%
Don't know	4%	2%	5%	4%	0%	3%	3%	3%	4%
Mean \$	475	520	1,181	960	1,884	251	619	799	4,920
Median \$	100	100	350	100	750	100	350	350	1,750

Ebooks and the Library's Materials Budget

At present, 87% of school libraries account for ebooks as part of the library/media center book budget, down only three percentage points from last survey. In the 2011 survey, we added “No set budget, money comes from special grants, gifts, etc.” which was selected by 13% of school libraries.

Figure 38. Q30: What budget line(s) does the purchase of ebooks come from? —All school libraries



Elementary and middle schools are more likely to rely on special grants or gifts for their ebook collections. Public schools are much more likely than private schools to rely on special gifts or grants (14% vs. 2%).

Table 35. Q30: What budget line(s) does the purchase of ebooks come from? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Library/Media Center book budget	84%	87%	94%	87%	93%	90%	88%	89%	95%
No set budget, money comes from special grants, gifts, etc.	16%	18%	5%	14%	2%	14%	13%	14%	4%
District budget	13%	13%	7%	13%	2%	6%	16%	8%	16%
Technology budget	15%	4%	3%	10%	12%	4%	9%	7%	10%
Classroom/Curriculum-based book budget	7%	6%	2%	5%	5%	6%	3%	4%	5%
AV budget	2%	4%	6%	4%	7%	1%	2%	7%	10%
No set budget, ebooks come from state/district level or consortium	2%	0%	4%	3%	0%	3%	4%	2%	5%
Other	4%	0%	4%	3%	2%	3%	4%	1%	6%
2010									
Library/Media Center book budget	87%	91%	91%	89%	98%	95%	89%	91%	91%
School District budget	22%	15%	10%	17%	0%	10%	11%	18%	14%
School Technology budget	20%	9%	8%	13%	2%	3%	13%	9%	15%
AV budget	9%	8%	9%	7%	2%	3%	0%	11%	9%
Classroom/Curriculum-based book budget	7%	5%	2%	3%	2%	0%	3%	2%	5%
Other	13%	6%	7%	11%	6%	15%	8%	7%	12%

Ebooks in Last Year's Materials Budget

This year's school library respondents said that last year ebooks comprised, on average, about 2% of their library's materials budget (mean 1.7%; median 0.0%).

Figure 39. Q31: What percentage of your library's materials budget did ebooks represent last year? —All school libraries

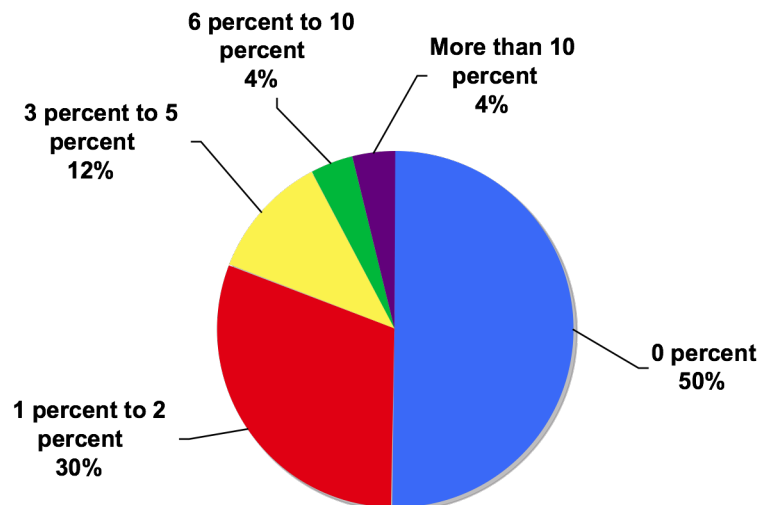


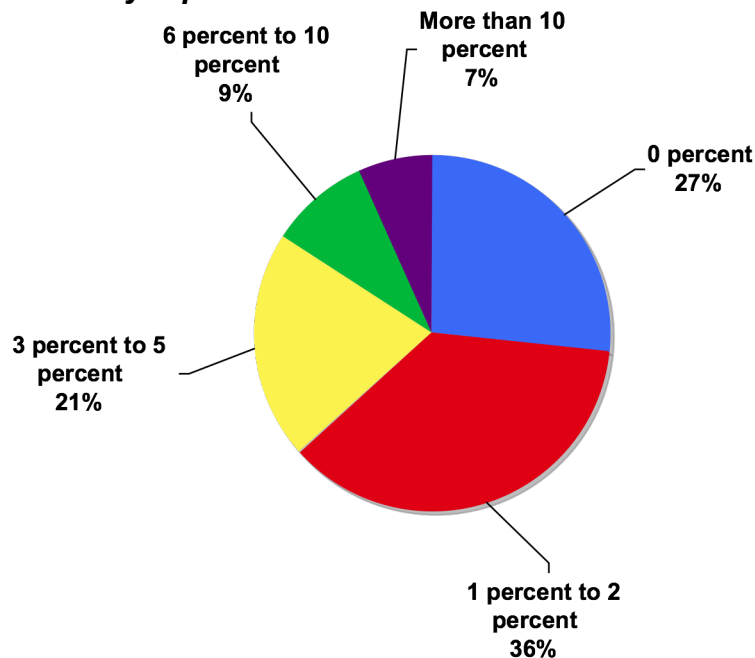
Table 36. Q31: What percentage of your library's materials budget did ebooks represent last year? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
0 percent	57%	61%	33%	52%	33%	71%	52%	45%	16%
1 percent to 2 percent	25%	26%	43%	30%	41%	17%	28%	35%	59%
3 percent to 5 percent	13%	3%	14%	12%	8%	6%	8%	13%	13%
6 percent to 10 percent	1%	8%	7%	3%	8%	3%	9%	5%	7%
More than 10 percent	4%	3%	3%	3%	10%	2%	4%	3%	6%
Mean %	1.5	1.5	2.2	1.6	2.8	1.0	1.9	1.8	2.7
Median %	0.0	0.0	1.4	0.0	1.4	0.0	0.0	1.2	1.6

Ebooks in the Current Materials Budget

This year, ebooks have grown not insignificantly and now represent, on average, 2.9% of school libraries' materials budgets (median 1.6%).

Figure 40. Q31: What percentage of your library's materials budget do ebooks currently represent? —All school libraries



Despite all the interest in ebooks we have seen among middle schools, ebooks only account for, on average, 2.8% of middle schools' total materials expenditures. Private schools and school libraries with the highest materials expenditures report that ebooks account for a larger chunk of the budget.

Table 37. Q31: What percentage of your library's acquisitions budget do ebooks currently represent? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
0 percent	33%	32%	13%	28%	15%	43%	28%	17%	4%
1 percent to 2 percent	34%	38%	41%	36%	41%	30%	39%	39%	46%
3 percent to 5 percent	21%	17%	22%	21%	18%	17%	18%	23%	23%
6 percent to 10 percent	8%	3%	16%	9%	8%	5%	6%	13%	14%
More than 10 percent	4%	11%	9%	6%	18%	5%	9%	7%	13%
Mean %	2.5	2.8	3.9	2.8	4.2	2.1	2.9	3.4	4.4
Median %	1.5	1.5	1.9	1.6	1.8	1.2	1.6	1.8	2.5

Ebooks in the Future Materials Budget

Last year, school libraries estimated that ebooks would represent, on average, 7.4 percent of their materials budget in five years (2015). This year, that has increased to 8.0 percent (median 8.5 percent). Almost four out of ten school library respondents (39%) feel that ebooks will represent more than 10 percent of their materials expenditures in five years (2016), up from 29% last year. Curiously, the number of respondents who felt that ebooks would represent 0 percent of their materials expenditures rose from 0% to 6%, perhaps in anticipation of slashed budgets.

Figure 41. Q31: What percentage of your library's materials budget do you predict ebooks will represent in 5 years? —All school libraries

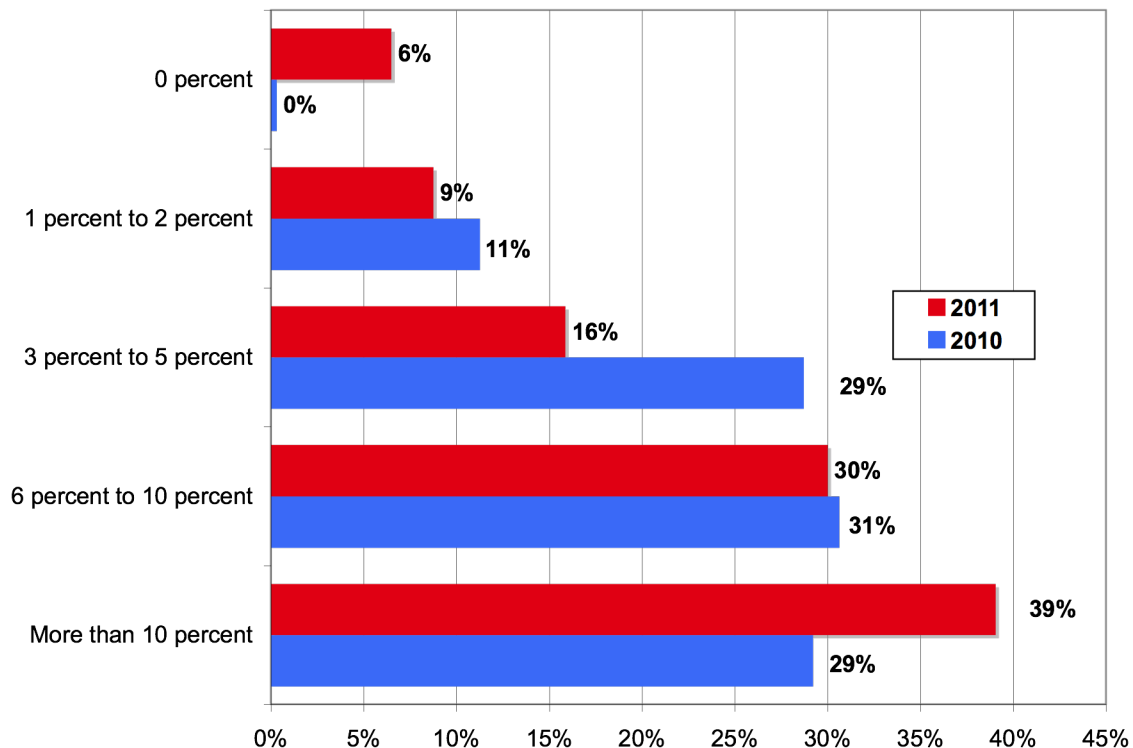


Table 38. Q31: What percentage of your library's materials budget do you predict ebooks will represent in 5 years? —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
0 percent	8%	7%	3%	7%	3%	14%	4%	5%	1%
1 percent to 2 percent	11%	11%	6%	9%	8%	14%	6%	6%	3%
3 percent to 5 percent	17%	17%	11%	16%	10%	16%	19%	13%	13%
6 percent to 10 percent	29%	30%	34%	30%	26%	27%	33%	32%	29%
More than 10 percent	36%	36%	45%	38%	54%	29%	37%	45%	54%
Mean %	7.6	7.7	8.9	7.9	9.3	6.6	8.1	8.7	9.6
Median %	8.0	8.1	9.5	8.4	11.3	6.8	8.4	9.3	11.3
2010									
0 percent	0%	2%	0%	0%	0%	3%	0%	0%	0%
1 percent to 2 percent	16%	13%	11%	11%	7%	18%	11%	11%	2%
3 percent to 5 percent	31%	27%	20%	28%	11%	18%	34%	26%	20%
6 percent to 10 percent	29%	32%	29%	32%	25%	36%	39%	29%	21%
More than 10 percent	24%	26%	40%	29%	57%	26%	15%	34%	57%
Mean %	6.8	7.1	8.3	7.4	9.7	7.1	6.5	7.8	9.7
Median %	6.4	7.0	8.6	7.3	11.5	7.3	6.4	7.8	11.5

General Conclusions

In terms of budgeting, ebooks still represent a very small percentage of school libraries' overall materials budget. Last year, they accounted for less than 2% of the total materials budget, although that has grown to about 3% this year. By 2016, school library respondents feel they will grow to about 8% of the overall materials budget.

On average, libraries said they spent \$1,020 on ebooks this year.

Unlike public libraries, who strongly indicated that the existence of ebooks was attracting new users to the library, school libraries saw less of that kind of increase—likely because many students are required to use the school library anyway. Still, a not insignificant number of school library respondents indicated that ebooks were luring new users to the library.

In Their Own Words...

Here, we conclude the write-in responses to the questionnaire item soliciting comments about ebooks:

- No additional money in budget.
- If we made them available for download, we would not have to worry about our inventory as much or replacing print materials as often. Site

licenses could pose problems, however, as could limitations on length/time of ebook usage.

- We need durable, inexpensive e-readers and more money to put this choice in front of patrons.
- Ebooks are a new format for my district. During the 2010-11 school year, the ebooks available to us came from a library consortium. Starting next year, we will also have access to ebooks purchased by my district, and I anticipate that will grow exponentially over the next several years.
- I got a Title I grant this year and decided to try ebooks through Follet. This will be the first year that I will use ebooks as well as iPads that I was able to also purchase. We will see how it works.
- I feel that indexed, ePub-like titles will be having an increasingly larger share of the school market. Ebooks that can be concurrently accessed on multiple device formats will lead the way. We look for more digital textbooks (with the ability for teachers to manipulate content) to push the static, paper text out sooner than later.
- Until recently, we have had absolutely no interest in ebooks; however, we purchased a new circulation and book library management system last year that allows remote access, so we had a slight increase. In June 2011, we went live online with Internet access from any location and I expect our requests to increase by 100% because students will have access to our circulation from home.
- This has been a terrific tool to entice our middle school reluctant readers.
- Gale Virtual Reference has been an easier “sell” to students and faculty with the rise of personal ebook use. They understand what it is. I have had requests from students and faculty regarding eBooks for recreational reading—but haven’t gone that route yet because I’m not clear on where the publishing industry is going. We do use (and I promote to students and their families) audiobooks through ListenNJ.org, which is now beginning to offer ebooks as well, and I am pointing my patrons in that direction. However, I would be very interested in starting to build our library’s own ebook collection for recreational reading, but haven’t found a vendor yet which offers terms which I think would be reasonable and a platform that would be manageable for our small school district.
- I have used ebooks for 7 years with our students. When conducting research our students check out approx. 3-5 books on our shelves, use 3-5 ebooks and use 2-3 online periodicals. They are able to write papers having a very good thesis and support it very well with very good information. This support allows them to become more critical in their thinking and writing. This process works very well in their overall success in high school and certainly prepares them well for college.
- Children are very engaged, particularly when illustrations or visuals are included.

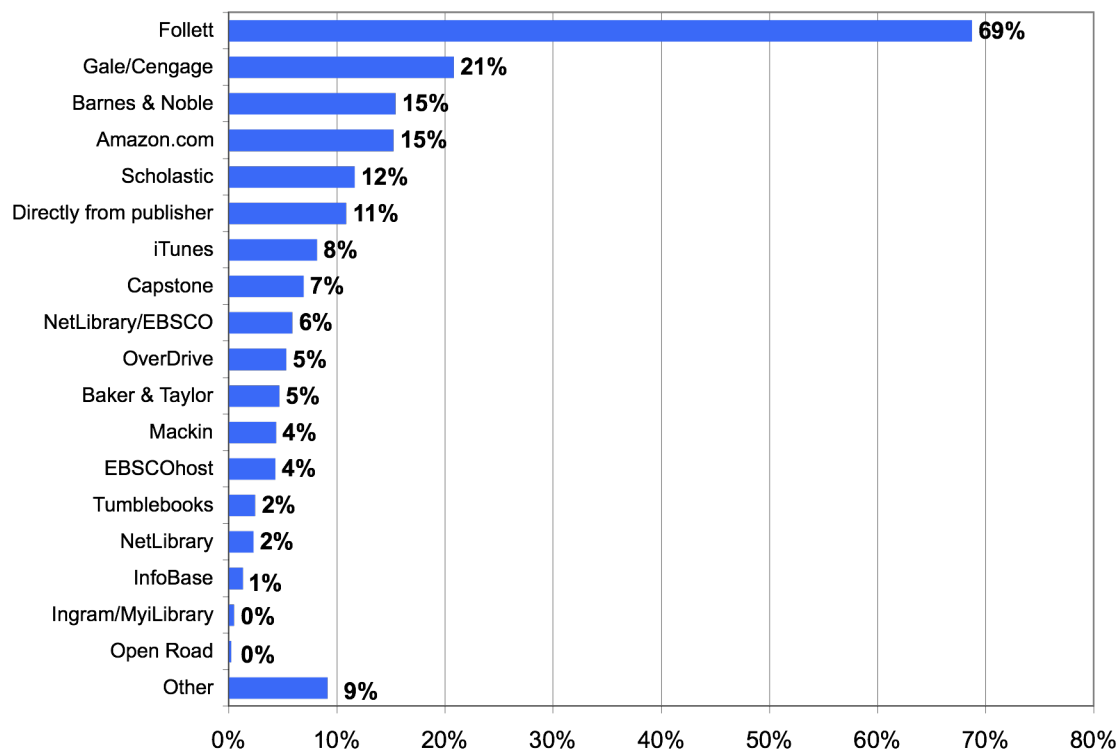
- Need a “McNaughton” model where we can have multiple copies/uses for a short period, then transfer that use to the next “hot” title.
- This school has a 90% free and reduced lunch rate (ie high poverty). The children don’t always have enough food to eat, more less an ebook reader! But I want them to be aware of such things, so I ordered one to show them on the computer. I’d like to add a few picture book titles each year to have a small selection that they can read on the school's (old and falling apart) computers.
- I am planning to really boost and promote an ebook collection next school year. I will need to use most of my books account from my budget to do this. So I will have to decrease the amount of print materials I will purchase. One serious concern regarding an ebook collection is my ability to develop the collection as the media specialist. I do not want and would not be interested in any format that would not allow me full control over which books are purchased, i.e., ebook of the month clubs. I want to embrace digital collections but not to the extent where the library is no longer seen as no longer viable.
- Our initial use of an e-book subscription has been well received by both students and staff. Unfortunately, our district cannot afford to continue the subscription beyond its first year. It will expire in December 2011 and will be missed.
- The model for us has been reference so that the students can gain access all at the same time to the same titles. I would like to move into ebooks for recreational reading but my district constrains my online resources so getting the changes isn’t just about getting the vendors on board.
- Most aggregators are priced beyond what a small high school can afford. Most students print a hard copy of relevant electronic information, so in a way, they are still interacting with print. I think they find this easier than logging back on to their computers, and easier to highlight and make notes. It is easier to move from one print document to the next than it is to move between multiple books/pages of books on a screen.
- I don't think that downloading ebooks is a good option for the elementary school setting. Reading online is an easier option. We are looking at creating ebook shelves for each school and one that is accessible by all 5 elementary schools.

5. LIBRARIES AND EBOOK VENDORS

Vendors Patronized and Preferred

Follett is the top vendor patronized by school libraries for ebooks; 69% buy through Follett, up from 61% last year. A distant second is Gale/Cengage, at 21%, down from 26%. Eleven percent of school libraries buy ebooks directly from the publisher, down from 16% last year. (For clarity, we only included 2011 survey data in Figure 42.)

Figure 42. Q38: From which vendor(s) does your library purchase ebooks? —All school libraries (multiple responses permitted)



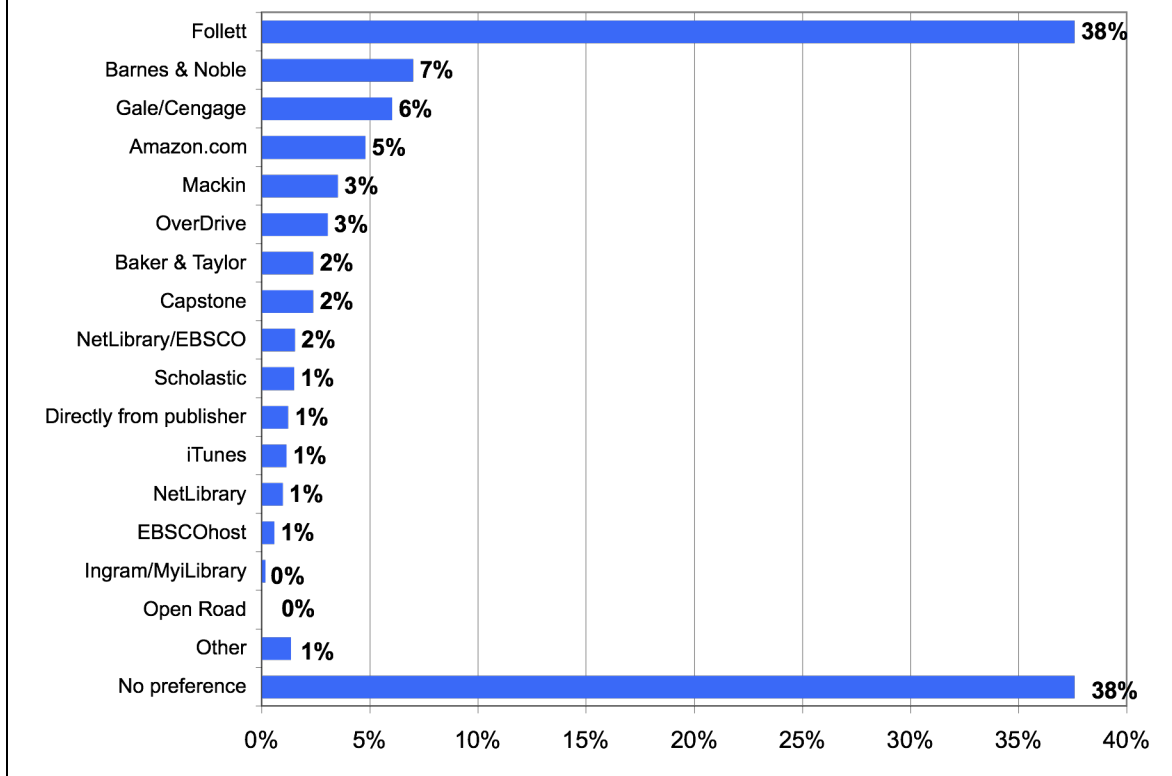
Follett is the prevailing ebook vendor for all school levels, especially elementary schools (72%, up from 67%). High school libraries are more likely to purchase ebooks from a variety of sources.

Table 39. Q38: From which vendor(s) does your library purchase ebooks? —School libraries by type of school and materials expenditure (multiple responses permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Follett	72%	69%	63%	70%	38%	63%	66%	68%	63%
Gale/Cengage	3%	22%	57%	20%	49%	13%	17%	40%	66%
Barnes & Noble	11%	15%	21%	15%	23%	10%	20%	22%	20%
Amazon.com	13%	16%	18%	14%	21%	13%	10%	24%	20%
Scholastic	18%	4%	3%	11%	10%	10%	6%	8%	5%
Directly from publisher	9%	5%	20%	10%	26%	6%	14%	10%	18%
iTunes	9%	7%	3%	8%	8%	10%	4%	9%	9%
Capstone	9%	9%	2%	7%	3%	5%	8%	4%	3%
NetLibrary/EBSCO	1%	8%	13%	4%	21%	3%	6%	10%	16%
OverDrive	5%	5%	4%	5%	5%	5%	6%	5%	5%
Baker & Taylor	5%	4%	4%	5%	3%	3%	5%	4%	5%
Mackin	5%	1%	4%	5%	0%	3%	5%	4%	3%
EBSCOhost	1%	3%	11%	3%	15%	2%	3%	8%	12%
Tumblebooks	4%	0%	0%	3%	0%	3%	0%	1%	3%
NetLibrary	0%	7%	4%	2%	5%	3%	4%	3%	5%
InfoBase	0%	1%	4%	1%	5%	0%	2%	2%	4%
Ingram/MyiLibrary	0%	0%	1%	0%	3%	2%	0%	1%	1%
Open Road	0%	1%	0%	0%	0%	2%	0%	0%	0%
Other	10%	5%	8%	9%	13%	16%	10%	4%	9%
2010									
Follett	67%	56%	44%	59%	38%	68%	55%	58%	43%
Cengage (Gale)	11%	39%	57%	36%	66%	21%	20%	47%	68%
Directly from publisher	15%	20%	24%	17%	28%	13%	18%	18%	25%
Amazon.com	15%	9%	10%	9%	30%	13%	5%	13%	18%
Capstone	19%	9%	2%	8%	11%	5%	13%	7%	11%
NetLibrary (EBSCO)	9%	13%	12%	10%	21%	8%	3%	12%	23%
iTunes	7%	2%	1%	3%	13%	8%	2%	4%	8%
Baker & Taylor	4%	2%	4%	4%	6%	5%	3%	2%	8%
OverDrive	4%	3%	1%	4%	2%	5%	2%	2%	8%
MyiLibrary (Ingram)	4%	3%	2%	1%	6%	3%	0%	3%	2%
Safari	2%	2%	0%	0%	4%	3%	0%	2%	0%
Audible.com	0%	2%	0%	1%	2%	3%	0%	1%	2%
Ebrary	0%	2%	0%	0%	2%	3%	0%	0%	2%
Other	13%	9%	27%	20%	13%	26%	17%	18%	15%

As for which vendor libraries *prefer* to work with, Follett tops the list at (38%, up a tad from 36%), with Barnes & Noble a very distant second at 7% (B&N was a new choice in the 2011 survey). Over a third, 38%, said “no preference.” (For clarity, we only included 2011 survey data in Figure 43.)

Figure 43. Q38: Which is your preferred ebook vendor? —All school libraries (only one response permitted)



Follett is the most preferred vendor for elementary and middle school libraries, and has even replaced Gale/Cengage as the preferred vendor for high schools. Elementary schools were the most likely to have no preference (44%).

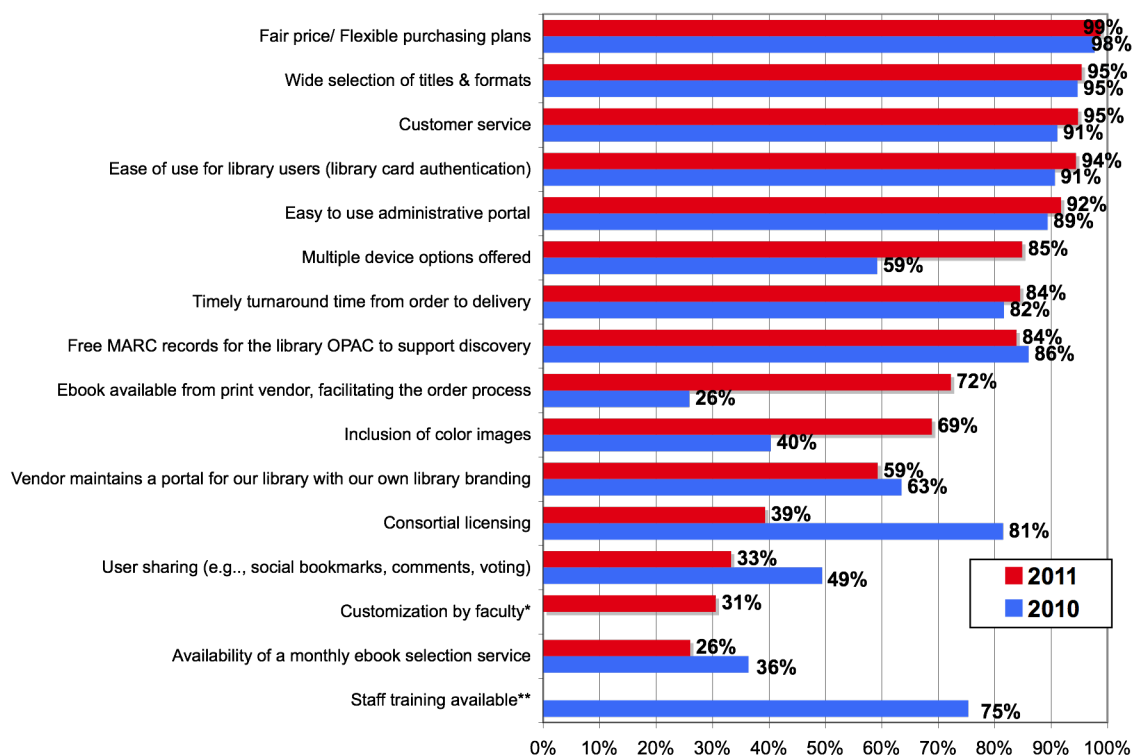
Table 40. Q38: Which is your preferred ebook vendor? —School libraries by type of school and materials expenditure (only one response permitted)

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Follett	44%	39%	27%	39%	23%	38%	38%	32%	22%
Barnes & Noble	5%	11%	7%	7%	10%	6%	8%	9%	11%
Gale/Cengage	1%	4%	18%	6%	20%	1%	5%	13%	18%
Amazon.com	3%	10%	6%	5%	3%	6%	5%	8%	5%
Mackin	5%	1%	2%	4%	0%	3%	2%	2%	3%
OverDrive	3%	4%	4%	3%	0%	4%	6%	1%	3%
Baker & Taylor	4%	1%	1%	3%	0%	0%	3%	1%	0%
Capstone	4%	1%	0%	3%	0%	0%	3%	1%	0%
NetLibrary/EBSCO	1%	0%	2%	1%	5%	1%	3%	0%	4%
Scholastic	3%	0%	0%	1%	3%	0%	1%	1%	0%
Directly from publisher	0%	1%	4%	1%	8%	1%	1%	3%	3%
iTunes	1%	1%	1%	1%	0%	1%	1%	1%	1%
NetLibrary	1%	0%	1%	1%	3%	1%	1%	0%	1%
EBSCOhost	0%	0%	1%	0%	3%	0%	2%	0%	3%
Ingram/MyiLibrary	0%	0%	1%	0%	3%	0%	0%	0%	1%
Open Road	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	1%	1%	8%	3%	1%	1%	4%
No preference	44%	39%	27%	39%	23%	38%	38%	32%	22%
2010									
Follett	44%	32%	25%	33%	26%	38%	33%	34%	18%
Cengage (Gale)	4%	20%	30%	17%	28%	8%	11%	21%	32%
Amazon.com	7%	5%	4%	4%	15%	5%	5%	4%	11%
Directly from publisher	4%	6%	7%	4%	6%	3%	7%	5%	3%
Capstone	7%	2%	0%	2%	0%	3%	3%	2%	0%
iTunes	4%	2%	1%	3%	0%	3%	2%	1%	5%
Baker & Taylor	2%	0%	4%	3%	0%	3%	2%	2%	5%
MyiLibrary (Ingram)	0%	2%	2%	0%	4%	0%	0%	2%	2%
NetLibrary (EBSCO)	0%	0%	2%	1%	0%	0%	2%	2%	0%
OverDrive	0%	0%	0%	1%	0%	0%	0%	0%	5%
Audible.com	0%	0%	0%	0%	0%	0%	0%	0%	0%
Ebrary	0%	0%	0%	0%	0%	0%	0%	0%	0%
Safari	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	6%	3%	4%	5%	0%	3%	10%	4%	0%
No preference	22%	29%	21%	25%	21%	36%	26%	21%	20%

Important Attributes

The most vitally important attribute for school libraries when considering an ebook vendor is “fair price”—this was either very important or important for almost every respondent to this survey (99%, about the same as last year). “Wide selection of titles and formats” and “customer service” tied for second at 95%. “Ebook available from print vendor” posted the most gains, from 26% last year to 72%. “Multiple device options” is also up dramatically, from 59% to 85%, as is “inclusion of color images,” from 40% to 69%. “Consortial licensing” is down, from 81% to 39%. “User sharing” is also not as important as it was last year.

Figure 44. Q37: Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) —All school libraries



Not too many differences exist between the library types with one exception; “inclusion of color images” is considerably more important to elementary school libraries. “Consortial licensing” is more important to private schools than public schools.

Table 41. Q37: Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) —School libraries by type of school and materials expenditure

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
2011									
Wide selection of titles & formats	94%	99%	98%	95%	95%	96%	98%	97%	93%
Ease of use for library users (library card authentication)	95%	96%	94%	94%	90%	93%	94%	96%	89%
Multiple device options offered	84%	90%	81%	85%	83%	93%	84%	85%	86%
Fair price/Flexible purchasing plans	99%	98%	99%	99%	98%	100%	98%	99%	99%
Customer service	96%	90%	95%	94%	98%	97%	92%	94%	93%
Timely turnaround time from order to delivery	87%	80%	80%	84%	83%	85%	86%	79%	84%
Easy to use administrative portal	94%	93%	89%	91%	93%	90%	89%	93%	87%
Vendor maintains a portal for our library with our own library branding	59%	58%	58%	59%	59%	60%	58%	56%	65%
Free MARC records for the library OPAC to support discovery	88%	81%	78%	84%	78%	83%	86%	79%	80%
Consortial licensing	39%	32%	38%	38%	58%	41%	37%	38%	47%
Availability of a monthly ebook selection service	28%	25%	22%	25%	29%	25%	21%	27%	26%
Ebook available from print vendor, facilitating the order process	78%	65%	66%	72%	68%	73%	61%	72%	66%
User sharing (e.g., social bookmarks, comments, voting)	34%	30%	29%	32%	36%	35%	32%	32%	34%
Inclusion of color images	80%	51%	52%	69%	59%	65%	58%	61%	59%
Customization by faculty	32%	22%	30%	29%	41%	26%	27%	32%	34%
2010									
Fair price	96%	100%	99%	99%	100%	97%	98%	99%	100%
Wide selection of titles & formats	96%	94%	94%	94%	96%	95%	95%	92%	95%
Customer service	91%	97%	90%	94%	86%	92%	86%	94%	95%
Ease of use for library users (library card authorization)	88%	92%	97%	93%	93%	95%	86%	95%	97%
Easy to use administrative portal	88%	79%	86%	86%	91%	94%	84%	88%	84%
Free MARC records	88%	89%	87%	88%	75%	82%	86%	86%	84%

	Type of School			Public or Private		2010–2011 Materials Expenditure			
	Elem.	Middle	High	Public	Private	<\$5K	\$5K–\$9K	\$10K–\$24K	\$25K+
for the library OPAC to support discovery									
Timely turnaround time from order to delivery	85%	79%	74%	81%	73%	74%	81%	79%	83%
Consortial licensing	82%	77%	72%	78%	72%	78%	81%	76%	72%
Staff training available	79%	73%	68%	74%	64%	74%	71%	70%	75%
Vendor maintains a portal for our library with our own library branding	62%	52%	67%	63%	68%	64%	59%	62%	73%
Multiple device options offered	51%	59%	73%	65%	55%	63%	60%	64%	68%
User sharing (social bookmarks, comments, voting)	49%	37%	49%	49%	35%	64%	38%	43%	48%
Inclusion of color images	38%	38%	39%	41%	33%	38%	29%	49%	37%
Availability of a monthly ebook selection service	35%	26%	39%	36%	29%	31%	29%	39%	38%
Ebook available from print vendor, facilitating the order process	24%	20%	26%	26%	18%	26%	24%	28%	23%

General Conclusions

Follett and Gale are the most-patronized ebook vendors for this library channel, and (so far) school libraries tend to be happy with them—although the individual verbatim comments can qualify the extent of those preferences. Pricing, formats, DRM, and inability to download to preferred devices are persistent bugaboos.

Of the three types of libraries we surveyed this year (public, academic, and school), school libraries remain in the earlier stages of ebook adoption, and thus are just starting to experience some of the advanced concerns about digital rights management, competing and conflicting formats, and simultaneous use that other libraries have developed. They are far more vocal about these issues this year than had been last year.

Publishers and vendors should pay particular attention to the preferred vendor attributes, and read them through the lens of the verbatim comments provided throughout this report. The ebook market is still very new for school libraries, and while the demand for electronic content is increasing, it's not a foregone conclusion that it will keep growing of its own accord. If users—especially those at the early and impressionable ages of el-hi school library users—are thwarted or frustrated by the ereading experience, they may simply avoid it as they get older.

In Their Own Words...

On the questionnaire, we encouraged respondents to write in a response to the question, “What do you need from publishers/vendors to make incorporating ebooks easier?” We present a selection of those verbatim comments here (lightly edited).

- I think the whole 26 user thing is pretty ridiculous. My hard copy books HAVE to last longer than that long most of the time or I can't afford to buy them. I understand they need to have some sort of replacement model ... but 26 is too low.
- More integration with OPAC; more vendors need to offer mobile apps. No restrictions on the amount of times an ebook can be checked out. Multiple users allowed at one time.
- For school use, ereaders need to be non wifi, so students are only reading, not surfing the web.
- An automatic return. When library users borrow ebooks, they forget to press the return button. Then the ebook is not available.
- Make them available for download to devices other than PCs.
- The prices are outrageous! They cost the same and sometimes more than the print copy. There is no reason that they should cost so much. If they were better priced I think more libraries would purchase them.
- Correct pagination, a note taking, highlighting option. (Not sure how this would work.)
- Better user rights (the whole HarperCollins thing is awful).
- We need e-books to download on the user's own device.
- One-on-one instruction from the vendor rep.
- Have the hit YA fiction titles ready to go on release day in all formats to fit all devices.
- In using ebooks with Follett Destiny, I need a way to enable students to check out ebooks on their Kindle. I also need a set of instructions to enable students to check out ebooks on Internet-capable devices. I have had some adults attempt to check out ebooks through Destiny, and it was quite cumbersome. I would like it to be simpler.
- Pricing for the current economy.
- More children's picture books available.
- A handheld device that is sturdy and will not be easily broken.
- The ability to purchase downloadable ebooks with purchase order makes it IMPOSSIBLE to purchase books from Barnes & Noble. I would not have bought the NOOKs if I had known this.

- Ebooks that are actually read out loud with the words highlighted as they're being read.
- Would like students to be able to check out an empty Nook and load e-books from library catalog.
- I would like to see an app for the ebook reader we are currently using so kids could download the app to their phone or device and read the ebooks there. I think the usage would go up if that were possible. It's just not as comfortable to read an ebook on a computer or a laptop.
- We have been hindered from purchasing ANY kind of downloadable ebook by the publishers' requirement to use a credit card to purchase downloadable ebooks. There is no credit card in use in the district, and they will not consider using one. Hence, the only ebooks we use currently are not downloadable, and are more comparable to a database than to a downloadable ebook.
- Digital natives want instant access using a variety of devices...do not limit eBook accessibility.
- New titles, desired titles often not available in ebook format. Difficulty to assess titles before purchase due to only being able to look at the first 10-15 pages. Often these pages contain bibliographic information and I need to be able to assess more of the book's contents. To be honest I'd like to have the entire book available for preview so I can make confident decisions when I purchase an ebook. Higher prices for unlimited circulation, concurrent use pose budget problems.
- Marketing materials.
- We use Follet Destiny for our online union catalog. It only allows ebooks in the PDF format. That is the big problem. Students want to be able to download to portable devices and cannot. We have expressed a desire to change this with Follet and it has not been made available yet. I would like to order some Kindles or Sony Readers but have no funds due to proration in the state of Alabama (3 years of it). All money I've received has been donated by the PTO and principal.
- Help with knowing what resources we actually already have and then help with how to market those to teens and teachers.
- Programs that donate ereaders for use in schools.
- \$\$ is always a problem. The cheaper the better....special rates for schools.

APPENDIX: SCHOOL LIBRARIES QUESTIONNAIRE

The Survey Methodology

The present report is one-third of an overall survey that included public and academic libraries, in addition to school libraries.

The ebook survey was developed by *Library Journal* and *School Library Journal* to measure current and projected ebook availability in libraries, user preferences in terms of access and subjects, and library purchasing terms and influences.

An e-mail invitation was sent to 38,300 *Library Journal* and *School Library Journal* newsletters subscribers on May 6, 2011, with a reminder to non-responders on June 24 and July 11. A survey link was advertised in *Library Journal* and *School Library Journal* newsletters. A drawing for two Nook Colors and four complimentary seats at the Library Journal/School Library Journal Virtual ebook Summit held on October 12, 2011 (VEBS II) were offered as incentive to reply.

The survey closed July 31, 2011 with 905 total school library respondents. The survey was developed, programmed, hosted and tabulated in-house by Library Journal. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. school libraries only. Data shown based on schools in total was weighted based on NCES (National Center for Education Statistics) data for number of U.S. school libraries: Elementary, Middle School, High School.

The 2010 data used for comparison was based on 697 U.S. school libraries.

School Library Ebook Questionnaire

1. What type of school do you work in? Check all that apply.

- ☐ Elementary school
- ☐ Middle/Junior High school
- ☐ High school
- ☐ Other school (K-8, K-12, etc.)
- ☐ Administration (e.g., district level)

2. Is your school public or private?

- ☐ Public
- ☐ Private
- ☐ Other

3. What is the zip code/postal code at your library's location? _____

4. Which of the following comes closest to your job title?

- ☐ Library Media Specialist
- ☐ Library Media Generalist
- ☐ Teacher Librarian
- ☐ Librarian
- ☐ District library coordinator/supervisor
- ☐ Other (please specify) _____

5. Approximately how many students attend the school you work in? *If you work in more than one school or at the district level, please answer for the total number of students you serve.*

- ☐ Under 200
- ☐ 200 - 499
- ☐ 500 – 749
- ☐ 750 - 999
- ☐ 1,000 – 1,499
- ☐ 1,500 – 1,999
- ☐ 2,000 or more, specify # _____

6. What was your library media center's total materials expenditure this past year ('10/'11 school year)? *If you work in more than one school or at the district level, please answer for the total number of schools you serve.*

- | | |
|--|--|
| <input type="checkbox"/> Less than \$2,500 | <input type="checkbox"/> \$15,000 - \$19,999 |
| <input type="checkbox"/> \$2,500 - \$4,999 | <input type="checkbox"/> \$20,000 - \$24,999 |
| <input type="checkbox"/> \$5,000 - \$9,999 | <input type="checkbox"/> \$25,000 - \$29,999 |
| <input type="checkbox"/> \$10,000 - \$14,999 | <input type="checkbox"/> \$30,000 or more |

In the following questions, the term 'ebook' refers to an electronic copy of a book that is read on a device or a computer, not listened to as in an audiobook.

7. How many ebooks does your school have access to or own? If you work in more than one school or at the district level, please answer for the total number of schools you serve.

- ☐ None (If none, skip to Q41)
- ☐ 1-5
- ☐ 6-10
- ☐ 11-20
- ☐ 21-50
- ☐ 51-100
- ☐ More than 100 (Specify #)_____

8. Have you experienced an increase in requests for ebooks since this time last year?

- ☐ Yes, dramatic increase
- ☐ Yes, slight increase
- ☐ Request level is unchanged
- ☐ We receive no requests for ebooks

9. Which categories of ebooks does your school library media center currently offer users? Check all that apply.

- ☐ Classic Literature
- ☐ Children's fiction
- ☐ Children's nonfiction
- ☐ Children's picture books
- ☐ Young adult fiction
- ☐ Young adult nonfiction
- ☐ Graphic novels
- ☐ Reference (non-circulating)
- ☐ Textbooks
- ☐ General adult nonfiction
- ☐ General adult fiction
- ☐ Bestsellers
- ☐ Other (specify)_____

10. What ebook usage license model is currently employed at your library? Check all that apply

- ☐ Single ebook use at a time
- ☐ Multiple ebook usage, but not unlimited. Specify #_____
- ☐ Unlimited access/simultaneous use
- ☐ Other (specify)_____
- ☐ Don't know

11. What is the circulation interval for ebooks at your library? Check all that apply.

- ☐ Ebooks do not circulate, for in-school use only.
- ☐ Less than 7 days
- ☐ 7 days
- ☐ 14 days
- ☐ 21 days
- ☐ 28 days
- ☐ User specified
- ☐ Other _____

12. Do you allow students/faculty to place holds on downloadable ebooks?

- ☐ Yes
- ☐ No
- ☐ Sometimes

13. (If yes) Have you ever purchased an extra digital copy to fulfill ebook holds?

- ☐ Yes
- ☐ No

14. What was your ebook circulation in the last two years?

2009-2010 school year circulation _____

2010-2011 school year circulation _____

15. Compared to this school year, do you expect next year's circulation of ebook titles will increase, stay the same or decrease?

- ☐ Increase, by what percentage? _____%
- ☐ Stay the same
- ☐ Decrease, by what percentage? _____%

16. In which format do users generally prefer ebooks? Check all that apply.

- ☐ PDF
- ☐ Full-text HTML
- ☐ ePub
- ☐ Optimized for dedicated ebook device (e.g., Kindle, Nook)
- ☐ Optimized for other mobile device (e.g., smartphone, iTouch, etc.)
- ☐ Other (specify) _____
- ☐ Don't know

17. What device(s) do your library users most often use to read circulating/trade ebooks? Check all that apply.

- ☐ Personal Laptop/Computer/Netbook
- ☐ Library computer
- ☐ Dedicated ebook reader (e.g., Nook, Sony Reader, Kindle)
- ☐ Other portable device (e.g., iPad, smartphone)
- ☐ Other (specify) _____
- ☐ Don't know

18. Do you allow students to download ebooks to their personal devices?

- ☐ Yes
- ☐ No

19. Do you circulate preloaded ereading devices?

- ☐ Yes, for in-library use only
- ☐ Yes, for take home use
- ☐ Not currently, but considering
- ☐ No

20. If yes, how many preloaded ereading devices does your library maintain? ____**21. If yes, which preloaded ereading devices does your library currently circulate?**

- ☐ Kindle
- ☐ Sony Reader,
- ☐ Nook,
- ☐ iPad
- ☐ Other (specify) _____

22. How does your library market the availability of ebooks in your library? (Check all that apply)

- ☐ Open school nights/parent association meetings
- ☐ During classroom instruction
- ☐ General online catalog/OPAC
- ☐ Digital collection link on website
- ☐ Ads for ebooks posted in library/Bookmarks/Fliers
- ☐ Library newsletter
- ☐ Social networking with students (e.g., Facebook, Twitter, etc.)
- ☐ Social networking with parents (e.g. Facebook, Twitter, etc.)
- ☐ Blog
- ☐ Other (specify) _____
- ☐ We do not market ebooks specifically

23. What hinders students/faculty from reading your media center's ebook content?

- ☐ Difficult to find/discover
- ☐ Difficult to read onscreen/online
- ☐ Difficult to annotate
- ☐ Difficulty with digital rights management
- ☐ Ebooks not available for preferred devices
- ☐ Limited access to e-reading devices (at home and/or school)
- ☐ Users prefer print
- ☐ In demand titles not in ebook format for libraries
- ☐ Long wait times for ebooks
- ☐ Lack of training
- ☐ Complex downloading process

- ☐ Unaware of ebook availability
- ☐ Ebook titles not available concurrent with print release
- ☐ Other (specify) _____

24. Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before?

- ☐ Yes
- ☐ No
- ☐ Don't know

25. How often do your users report technical problems when downloading an ebook?

- ☐ Often
- ☐ Sometimes
- ☐ Rarely
- ☐ Never

26. What do you need from publishers/vendors to make incorporating ebooks easier?

27. Is your school part of a consortium license program for its ebook collection?

- ☐ Yes
- ☐ We used to be, but no longer. Why did you leave the consortium?
- ☐ No, but plan to in the future
- ☐ No
- ☐ Don't know

28. [if yes] Does your library also buy ebooks independently?

- ☐ Yes
- ☐ No

29. Do you have a role in making purchasing recommendations/decisions for ebooks in your school?

- ☐ Yes
- ☐ No ([Go to Q40](#))

30. Which budget line(s) does the purchase of ebooks come from? Check all that apply

- ☐ Library/Media Center book budget
- ☐ Classroom/curriculum-based book budget
- ☐ AV budget
- ☐ Technology budget
- ☐ District budget
- ☐ No set budget, money comes from special grants, gifts, etc.
- ☐ No set budget, ebooks come from state/district level or consortium

☐ Other (please specify) _____

31. Approximately what percentage of your library's materials budget did ebooks represent last year, in the current school year and what percent do you predict ebooks will represent in 5 years?

	0%	1% - 2%	3% - 5%	6% - 10%	More than 10%
Last year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In 5 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32. How much would you estimate your library spent on ebooks for the current school year (2010/2011)?

- ☐ \$0 – all ebooks provided by state/district/consortium
☐ Less than \$200
☐ \$200 - \$499
☐ \$500 - \$999
☐ \$1,000 - \$2,499
☐ \$2,500 - \$4,999
☐ \$5,000 or more (specify) \$ _____
☐ Don't know

33. What factors influence your decision to purchase an ebook for your media center? (Check all that apply)

- ☐ Projected usage/high demand titles
☐ Availability as a single title purchase
☐ Book reviews
☐ Limited shelf space
☐ Licensing terms/Lending caps (e.g., Harper Collins 26 circ model)
☐ Required use of titles in the curriculum
☐ Faculty request
☐ Student request
☐ Parent request
☐ Less complicated digital rights management
☐ Inclusion in bundles with attractive pricing
☐ Ease of purchase/Integrated purchasing with print book
☐ Special grant
☐ Multiple users allowed
☐ Less costly than print edition
☐ Other (Please specify) _____

34. How do you generally find and learn about ebooks? (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Requests from faculty packages/bundles | <input type="checkbox"/> Inclusion in content |
| <input type="checkbox"/> Requests from students | <input type="checkbox"/> Vendor websites |
| <input type="checkbox"/> Requests from parents | <input type="checkbox"/> Publishers' marketing material |
| <input type="checkbox"/> Library colleagues/district specialists | <input type="checkbox"/> Conferences/Tradeshows |
| <input type="checkbox"/> Professional level journals | <input type="checkbox"/> Webcasts/webinars |
| <input type="checkbox"/> Consumer media | <input type="checkbox"/> Other (Specify)_____ |
| <input type="checkbox"/> Blogs | |

35. What type(s) of purchasing terms does your library typically use when acquiring ebooks? Check all that apply.

- | | |
|--|--|
| <input type="checkbox"/> Purchase with perpetual access | <input type="checkbox"/> Concurrent use/access |
| <input type="checkbox"/> Purchase with perpetual access through self-hosting | <input type="checkbox"/> Bundled with other content |
| <input type="checkbox"/> User-driven acquisition | |
| <input type="checkbox"/> Subscription | <input type="checkbox"/> Upfront purchase with maintenance fee |
| <input type="checkbox"/> Pay-per-use | <input type="checkbox"/> Upfront purchase with update fee |
| <input type="checkbox"/> License with set # of circs model | <input type="checkbox"/> Other |
| (specify)_____ | |

36. What do you feel would be a fair and realistic model for licensing ebooks? Check all that apply.

- | |
|---|
| <input type="checkbox"/> Lending cap model (e.g., 26 circs HarperCollins model) |
| <input type="checkbox"/> Maximum access (multiple users allowed simultaneous access) |
| <input type="checkbox"/> Opportunity to license for varying # of circulations |
| <input type="checkbox"/> Unlimited circs using one reader/one book model |
| <input type="checkbox"/> 1 year interval |
| <input type="checkbox"/> 2 year interval |
| <input type="checkbox"/> Patron driven acquisition model (Multiple titles available, purchase based on holds) |
| <input type="checkbox"/> Other, specify_____ |

37. Please rate the importance of the following attributes when considering an ebook vendor?

	Very Important	Important	Somewhat Important	Not Important	No Opinion
Ease of use for library users (library card authentication)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple device options offered (iPod Touch, Nook, smartphone, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy to use administrative portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains a portal for our library with our own library branding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wide selection of titles & formats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fair price/ Flexible purchasing plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free MARC records for the library OPAC to support discovery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timely turnaround time from order to delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ebook available from print vendor, facilitating the order process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a monthly ebook selection service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User sharing (e.g., social bookmarks, comments, voting)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consortial licensing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inclusion of color images/video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customization by faculty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

38. From which vendor(s) do you purchase ebooks for your media center?
(Check all that apply)

39. Which is your preferred ebook vendor?

	Q38. ebook vendor(s) you purchase from	Q39. One Preferred ebook vendor
Amazon	<input type="checkbox"/>	<input type="checkbox"/>
Baker & Taylor	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble	<input type="checkbox"/>	<input type="checkbox"/>
Capstone	<input type="checkbox"/>	<input type="checkbox"/>
EBSCOhost	<input type="checkbox"/>	<input type="checkbox"/>
Follett	<input type="checkbox"/>	<input type="checkbox"/>
Gale/Cengage	<input type="checkbox"/>	<input type="checkbox"/>
Ingram/MyiLibrary	<input type="checkbox"/>	<input type="checkbox"/>
iTunes	<input type="checkbox"/>	<input type="checkbox"/>
NetLibrary	<input type="checkbox"/>	<input type="checkbox"/>
Open Road	<input type="checkbox"/>	<input type="checkbox"/>
OverDrive	<input type="checkbox"/>	<input type="checkbox"/>
Scholastic	<input type="checkbox"/>	<input type="checkbox"/>
Directly from publisher	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
No Preference		<input type="checkbox"/>

40. If you have any comments about ebooks in your media center/school, please write them below.

FOR THOSE WHO DO NOT CURRENTLY OFFER EBOOKS, FUTURE PLANS QUESTIONS

41. Why doesn't your library offer ebooks? Check all that apply.

- ☐ No money for ebooks
- ☐ Lack of ereading devices
- ☐ Lack of technical support
- ☐ Don't understand logistics of ebooks
- ☐ No demand for them from users
- ☐ Waiting to see what the best platform will be
- ☐ Other (specify) _____

42. What are your library's plans for ebook purchases in the next two years?

- ☐ We will definitely purchase ebooks to add to our collection
- ☐ We may purchase ebooks but it is not a priority
- ☐ We will definitely NOT purchase ebooks to add to our collection

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CATHY HOEY

646-380-0725; choey@mediasourceinc.com

LESLIE JONES

630-771-1360; ljones@mediasourceinc.com

JANICE WELCH

770-607-3421; jwelch@mediasourceinc.com

ROY FUTTERMAN, Advertising Director

646-380-0718; rfutterman@mediasourceinc.com

HOWARD KATZ

646-380-0730; hkatz@mediasourceinc.com